North Carolina Department of Health and Human Services

Division of Aging and Adult Services

Aging Resources Management System (ARMS)

Version 3.1

October 2007

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1 Introduction and Overview

Welcome to the Aging Resources Management System (ARMS). The ARMS system is accessible by all area agencies on aging, service providers, and any government entity with the need to access data.

The Aging Resource Management System (ARMS) is a client tracking system for demographic data and a reimbursement system that ties reimbursement to performance.

1.1 About this User Guide

The information in this document is presented so that users with different access levels may quickly find those sections which are relevant to their needs. These sections include:

Introduction and Overview – Describes the ARMS purpose and intended users and includes document conventions.

Basic Functionality – Opening the ARMS application and navigating through the system. Applicable to all users

Region – Those aspects of ARMS which are available to *regional* users.

Provider – Those aspects of ARMS which are available to *providers.*

County – Those aspects of ARMS which are available to *county* users.

Report – Describes the *reports only* section of ARMS.

Administrator – Those aspects of ARMS which are available to *administrative* users.

Supplemental Material – Appendices, etc.

All ARMS users should be familiar with the material in **Basic Functionality** but may turn directly to those sections by which they may complete their required tasks.

Each ARMS user will be assigned one of the roles described above, and may turn directly to the appropriate section of this manual where those functions and features available for each user type are described in detail.

Where the functions are identical across the roles, users will be directed to where the relevant location in this document. Electronic versions of this manual will include hyperlinks.

NOTE: To protect privacy, all client names and information displayed in this document are fictitious.

1.2 What is ARMS?

ARMS provides users with the convenience of on-line web access. The system includes functionality and features to facilitate data entry, reporting, and tracking of client information and service impacts over time. At any given time during the year, data is available to report service unit, program costs and income, and non-unit costs such as area planning and administration, etc.

1.3 ARMS Objectives

ARMS is designed with the following goals:

- To establish a statewide database for reporting client demographic data including eligibility.
- To establish a statewide database for budgetary control, delivery of units of service and non-unit activities incorporating Older Americans Act regulations on matching, program income, and other requirements as needed.
- To provide a linkage of databases to track services and costs to the client level.
- To meet federal reporting requirements.

1.4 Who uses ARMS?

The ARMS system is written for the use of the Division of Aging and Adult Services (DAAS) and its constituents. Those who will use ARMS include:

- Regional Area Agencies on Aging
- Aging Service Providers (non-profit, profit, public, minority)
- County Lead Agencies and other DHHS Personnel

Each of the above user types requires a different level of access to the features and functionality of ARMS. This access is managed by DAAS, which will assign each individual ARMS user a different role which is appropriate to the access level he or she requires.

The five user access types are:

- Provider
- Region
- County
- Admin
- Report

The functionality associated with each of these access types is outlined in Table 1.

User Type	Functions Available
	•
Region	Users assigned the “Region” role can perform all the Provider functions, with the addition of these administrative functions: • Add / Modify Region Details • Add / Update Region Budget • Add / Update Region Expenditures • Add / Update Provider Contract Segments • Search for clients and review their information • Add / Update a new client • Add / Update a service to a client • Add / Update monthly service totals for client • Add / Update a site/route/worker code • Modify provider agency information • View / Print Provider specific reports • Import Service Data • Add / Update non-unit reimbursement data • Add / Update consumer contributions/program income
Provider	Users assigned a role in ARMS as “Provider” will be able to perform the following functions. • Search for clients and review their information • Add / Update a new client • Add / Update a service to a client • Add / Update monthly service totals for client • Add / Update a site/route/worker code • Modify provider agency information • View / Print Provider specific reports • Import Service Data • Add / Update non-unit reimbursement data • Add / Update consumer contributions/program income
County	ARMS users with “County” access may only View or Print County Reimbursement Reports
Report	Those assigned “Report” access may only View or Print Reports

Table 1 – ARMS Functions Available by User Type=Provider

1.5 Document Conventions

This document presents text in different formats which communicate specific information about the system. These formats are described (below) in Table 2:

Format or Style	Description
Boldface text	Indicates an action to take in the system such as clicking a button or selecting a drop-down list box item or item on a menu. For example: click the **Search** button.
Italics	Indicates text to enter into a field in ARMS.
Hyperlinks	A link to a web site or to another part of this User Guide. These are working links for those reading this document electronically.
Pipe | Separated | Text	This indicates the need to click on a series of links or menu items, which will appear in order as they are selected. Most commonly, they are used while navigating in ARMS.
Links…	Drill-down links are usually found in columns. Clicking these opens additional detail screens specific to the data item displayed
"tear away" line	ARMS screens are often quite long. This "tear away" line indicates that the actual display is too long to include in this document, and users will need to scroll down to see the full list.

Table 2 – Document Conventions

Specially formatted boxes are used throughout this guide to highlight hints and notes. Examples of these formats are provided below.

Hint: ARMS users can navigate to functions available for their user types via the menu available on the top of each ARMS page.

NOTE: Functions or features requiring special attention or considerations.

1.6 Basic ARMS Functionality

This section describes the access, support, and basic functionality features which apply to all ARMS users.

1.7 Accessing the ARMS System

Only authorized users can access the ARMS System using any Internet connection. An ARMS user ID and password are assigned—along with the appropriate user role—by DAAS. Contact Linda Owens at 919-733-8390 to request access.

1.8 System Availability & Connectivity

Most questions about ARMS—including news, updates and documentation—will be located on the ARMS support website. (http://www.ncdhhs.gov/aging/arms/armspage.htm). Users are strongly encouraged to use this resource before calling Regions or DAAS ARMS Coordinators.

ARMS is designed to be available 24 hours a day including weekends. There will be times when we may have to bring ARMS down for maintenance and to run reimbursement reports. There may also be occasional times the server might be unavailable to users.

Connectivity for users is available from DHHS Customer Support Center Monday through Friday from 7:00 a.m. to 5:30 p.m. except State observed holidays.

To reach ARMS tech support, call 919-855-3200 and press option 2. You will be asked a series of questions, including but not limited to:

1. The system you are using (ARMS)
2. Your Name or Your User ID
3. Location
4. Depending on what role you have in the system:
    - Provider Role must provide the Provider Code (G055)
    - Region Role must provide the Region Code (G)
    - Report Role must provide their DHHS Division (Controller's Office)
    - County Role must provide their County (Craven)

For **Application/Support** call the ARMS Coordinators, Linda Owens or Annette Bagwell, at 919-733-8390. To speed the trouble-shooting process, be prepared with exact details about the behavior, issues, or error messages received. You can also e-mail linda.owens@ncmail.net or annette.bagwell@ncmail.net.

1.9 ARMS User Data Entry Requirements

Data must be in ARMS by 5:00 p.m. on or before the 11th of the each month to be reimbursed for the current report period. When the 11th falls on a holiday the due date is the next working day. If the 11th falls on a weekend, data is due the following Monday. The system will be available 24 hours seven days a week (24/7). There may be occasional times the server may be unavailable to users.

The processing of reimbursement reports and other financial documents will occur on the 12th calendar day of the month. When the 12th falls on a holiday the processing date is the next working day. If the 12th falls on a weekend, the processing date will be the following Monday. These reports along with previous months will be available at all times. Other reports, such as demographic, waiting list, etc. will be available on demand.

1.10 Starting ARMS

Follow these steps to begin using the ARMS system:

1. Launch an Internet browser using Internet Explorer 6.0 or higher or Netscape Navigator 7.0 or higher. **Preferred.**
2. Click the "**Access ARMS**" link from the ARMS support website (http://www.ncdhhs.gov/aging/arms/armspage.htm):

   Most users will get a Security Alert screen similar to this:

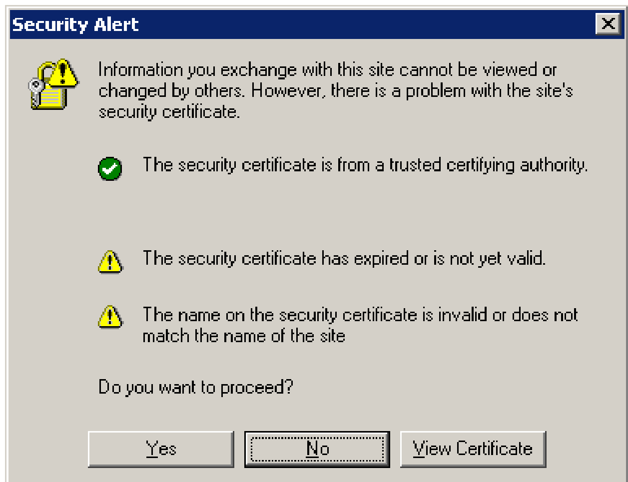


Figure 1 – Security Alert

Click **Yes** to continue.

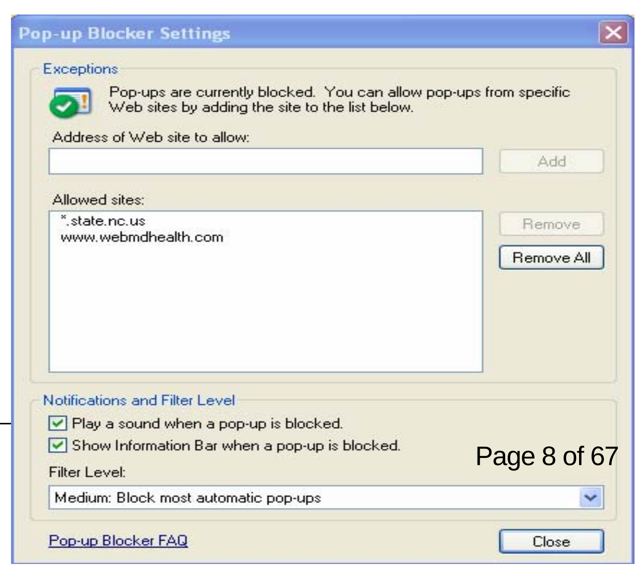
Hint: For easy access directly to the ARMS system, add the WIRM link to "**Favorites"** in Internet Explorer or "Bookmark this Page" in Netscape.

NOTE: You must have pop-ups enabled in order for the menu structure to operate correctly.

a. To enable pop-ups in Internet Explorer, Click on the **Tools menu | Pop-up Blocker | Pop-up Blocker Settings**

b. Enter the ARMS website address in the text box under "*Address of Web site to allow*"

c. Click **Add**. This will be required for each PC used to access ARMS.



Pop-up Blocker must be enabled to run reports

Figure 2 – Pop-Up Blocker Settings

3. The Web Identity Role-based Management (WIRM) login page will display.

Figure 3 – WIRM Portal Login Screen

3. Enter the assigned WIRM user Name and Password. (This name is typically the user's first and last name (Example – linda.owens). There will be some exceptions with common names (John Smith, Mary Smith) as these require using middle initials or some other combination. The password must be at least 8 alphanumeric characters. The password is case-sensitive and will expire every 90 days. You may change your password at any time by using the **My Settings** link.

   If the **name is not found** message appears, check the assigned username and try again. If the **password is incorrect** message appears, check the password and type it in again. WIRM users have three consecutive tries to login with their Name and Password, after which they will be *locked out* of WIRM. This helps prevent "hackers" from gaining system access.

   If locked out, users **must** call the DHHS Customer Support Center (Help Desk), 919-855-3200, option 2, to have their password reset. The Division of Aging and Adult Services staff **cannot** reset users' password.

4. Click Login.

A user profile has been set up for **all** authorized users. Functionality in ARMS is based on the user's unique profile. The profile includes identifying information about each user and the information a user can access. Users will see only that functionality which is assigned to one of the five access roles (described in Table 1).

> **NOTE**: Providers that have contracts across regions will have only one unique profile with access to all the agencies they are associated with. For example, Legal Providers serve across regions.

Some users have multiple applications in WIRM, all of which are visible by clicking the **My Applications** tab which appears beneath the WIRM logo.

Figure 4 — The WIRM Portal "My Applications" Screen

Figure 5 — WIRM Portal "My Applications" Screen

5. Click the **thumbprint screen shot** or the **title text** to open ARMS to the home page.

> **NOTE**: Each ARMS user role has a different initial screen. Samples and functionality will be different for each user from this point forward. These are described in detail for each user/role in the appropriate section of this document.

The WIRM Portal automatically logs users OFF the system after a period of inactivity. If the following screen appears simply login again to continue using ARMS.

Figure 6 – Session Expired Screen

1.11 Getting Help in ARMS

Click on **Help** to open a copy of the latest ARMS *User Manual*.

1.12 Logging Out of ARMS

When finished using ARMS, always log out by clicking **Logout**

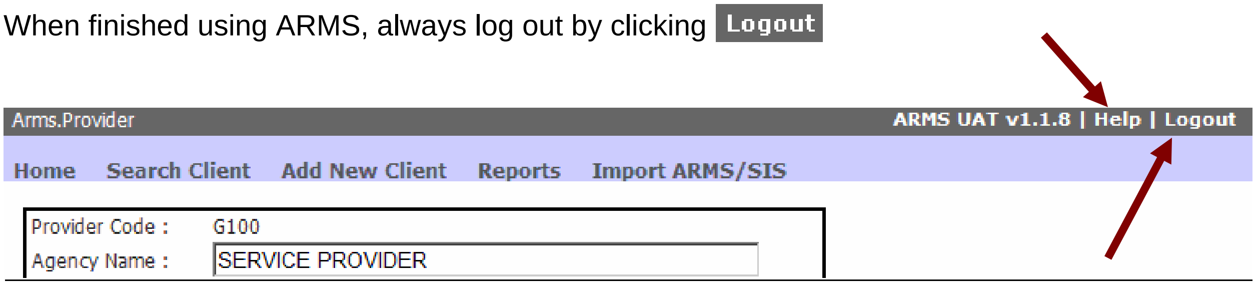


Figure 6 Help and Logout

Logging out helps prevent unauthorized access to ARMS. The WIRM system will automatically log users out after a given period of inactivity. (See Figure 6)

2 Region User

The Region user role in ARMS provides utility for those who manage providers, agency information, budgets and client service data.

2.1 Navigating the Region Functions

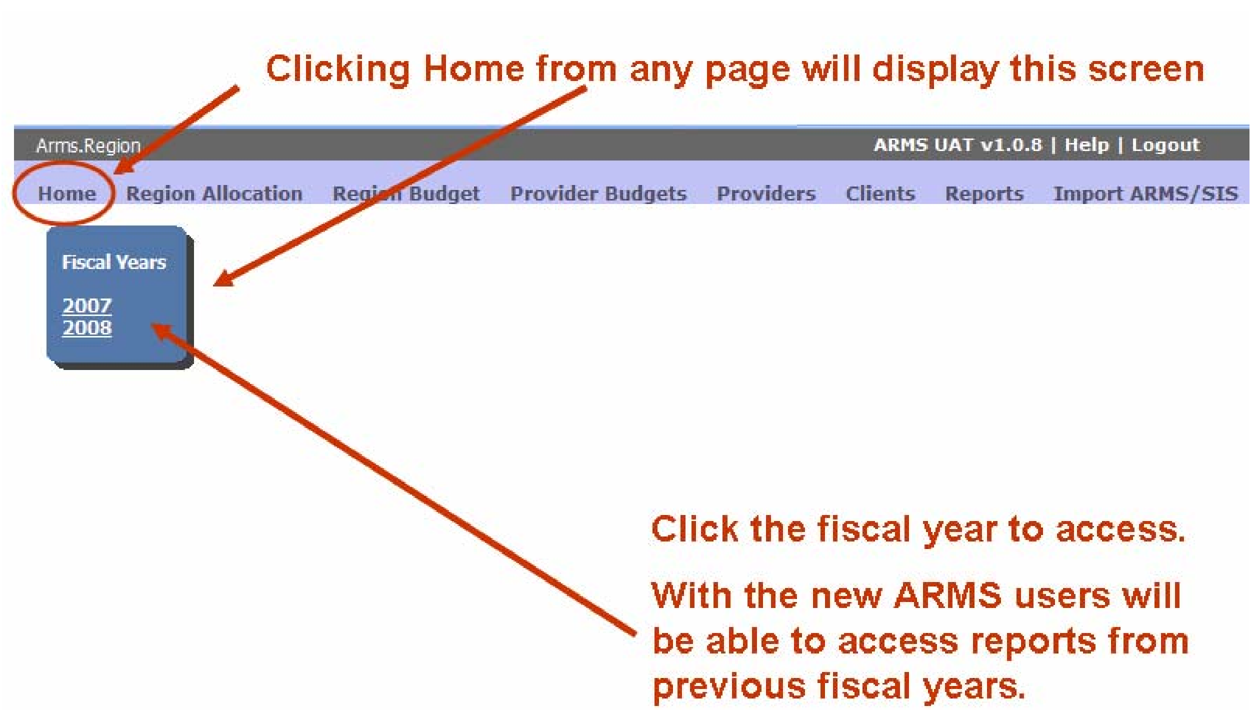
The header section of the ARMS screen provides links to available functions.

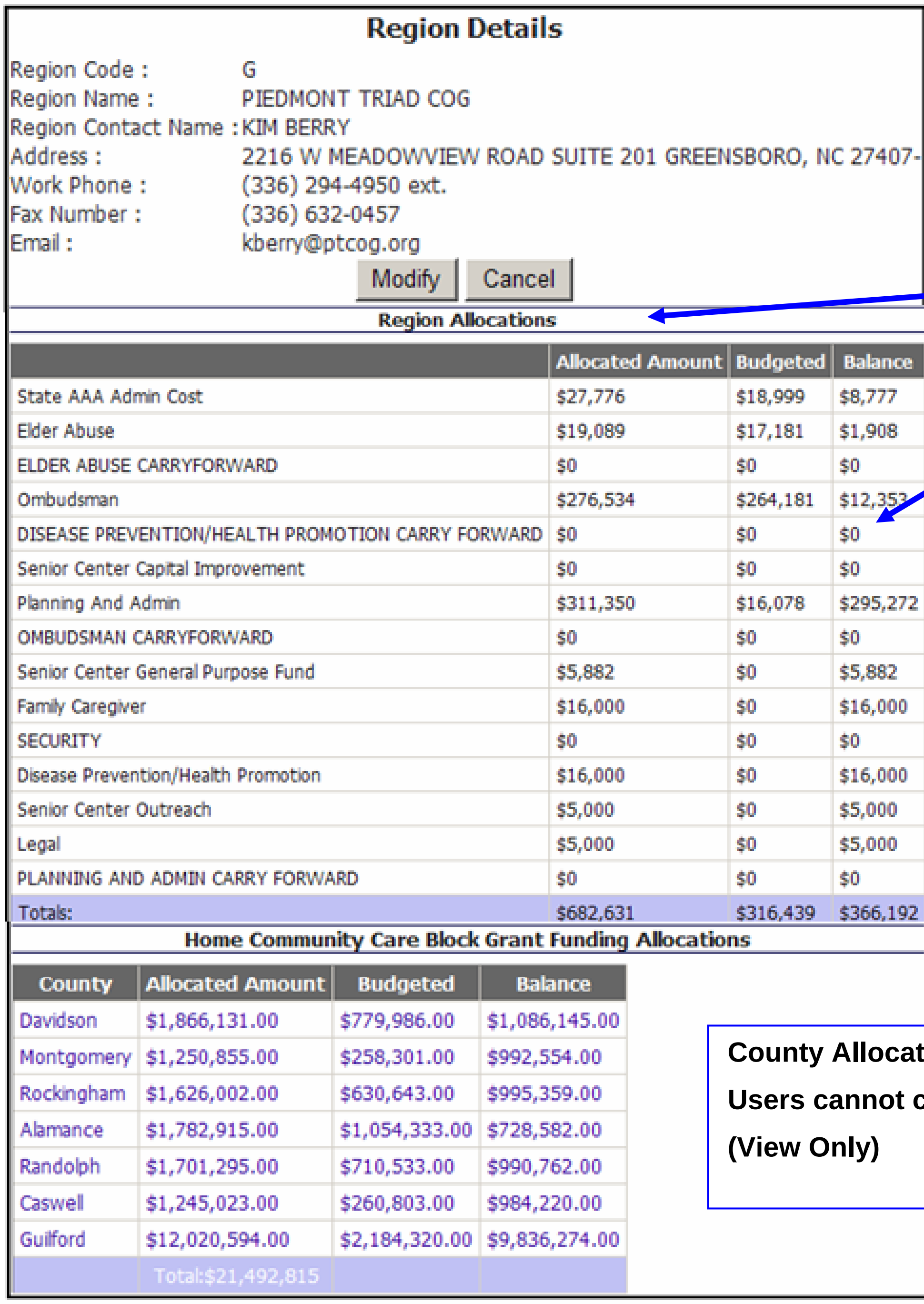
Figure 7 – Region User Navigation Bar

Click on any of the headings in this bar to open a separate area of Region user functions.

2.2 Initial Screen (Home)

Region users will see the following screen when they log into ARMS.





Region Details

Region Code : G
Region Name : PIEDMONT TRIAD COG
Region Contact Name : KIM BERRY
Address : 2216 W MEADOWVIEW ROAD SUITE 201 GREENSBORO, NC 27407-
Work Phone : (336) 294-4950 ext.
Fax Number : (336) 632-0457
Email : kberry@ptcog.org

Modify Cancel

Region Allocations

	Allocated Amount	Budgeted	Balance
State AAA Admin Cost	$27,776	$18,999	$8,777
Elder Abuse	$19,089	$17,181	$1,908
ELDER ABUSE CARRYFORWARD	$0	$0	$0
Ombudsman	$276,534	$264,181	$12,353
DISEASE PREVENTION/HEALTH PROMOTION CARRY FORWARD	$0	$0	$0
Senior Center Capital Improvement	$0	$0	$0
Planning And Admin	$311,350	$16,078	$295,272
OMBUDSMAN CARRYFORWARD	$0	$0	$0
Senior Center General Purpose Fund	$5,882	$0	$5,882
Family Caregiver	$16,000	$0	$16,000
SECURITY	$0	$0	$0
Disease Prevention/Health Promotion	$16,000	$0	$16,000
Senior Center Outreach	$5,000	$0	$5,000
Legal	$5,000	$0	$5,000
PLANNING AND ADMIN CARRY FORWARD	$0	$0	$0
Totals:	$682,631	$316,439	$366,192

Home Community Care Block Grant Funding Allocations

County	Allocated Amount	Budgeted	Balance
Davidson	$1,866,131.00	$779,986.00	$1,086,145.00
Montgomery	$1,250,855.00	$258,301.00	$992,554.00
Rockingham	$1,626,002.00	$630,643.00	$995,359.00
Alamance	$1,782,915.00	$1,054,333.00	$728,582.00
Randolph	$1,701,295.00	$710,533.00	$990,762.00
Caswell	$1,245,023.00	$260,803.00	$984,220.00
Guilford	$12,020,594.00	$2,184,320.00	$9,836,274.00
	Total:$21,492,815		

The second part of the Region Detail screen shows the Allocations for the Region.

Users cannot change the allocated amounts.

(View Only)

County Allocations

Users cannot change

(View Only)

Figure 8 – Region User Initial Screen

NOTE: Clicking either **Home** or **Region Allocation** brings up *the same exact screen*.

2.3 Change Region Contact Information

The initial screen (for both **Home** and **Region Allocation**) is divided into two main sections. The top section contains the contact information for the Region user logged in:

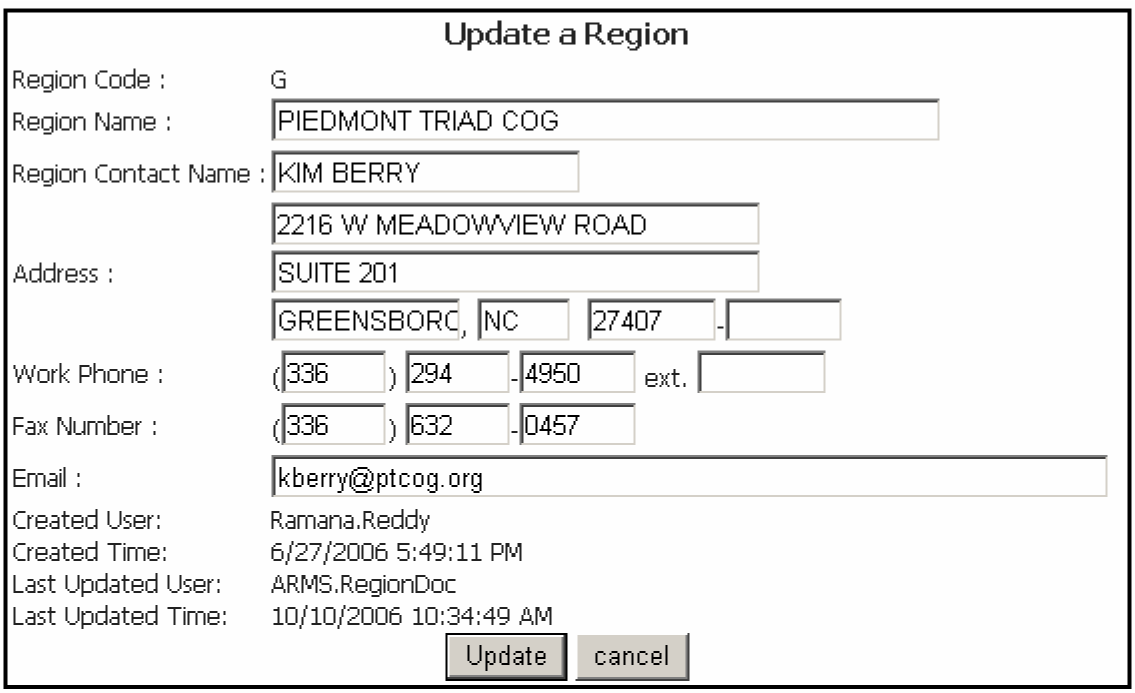
Region Details

Region Code :	G
Region Name :	PIEDMONT TRIAD COG
Region Contact Name :	KIM BERRY
Address :	2216 W MEADOWVIEW ROAD SUITE 201 GREENSBORO, NC 27407-
Work Phone :	(336) 294-4950 ext.
Fax Number :	(336) 632-0457
Email :	kberry@ptcog.org

Modify Cancel

Figure 9 – Region User Contact Details

The user may update the Region Details by clicking on **Modify**. Click **Cancel** to return to the previous screen without saving.



Update a Region

Region Code :	G
Region Name :	PIEDMONT TRIAD COG
Region Contact Name :	KIM BERRY
Address :	2216 W MEADOWVIEW ROAD SUITE 201 GREENSBORC, NC 27407 -
Work Phone :	(336) 294 - 4950 ext.
Fax Number :	(336) 632 - 0457
Email :	kberry@ptcog.org
Created User:	Ramana.Reddy
Created Time:	6/27/2006 5:49:11 PM
Last Updated User:	ARMS.RegionDoc
Last Updated Time:	10/10/2006 10:34:49 AM

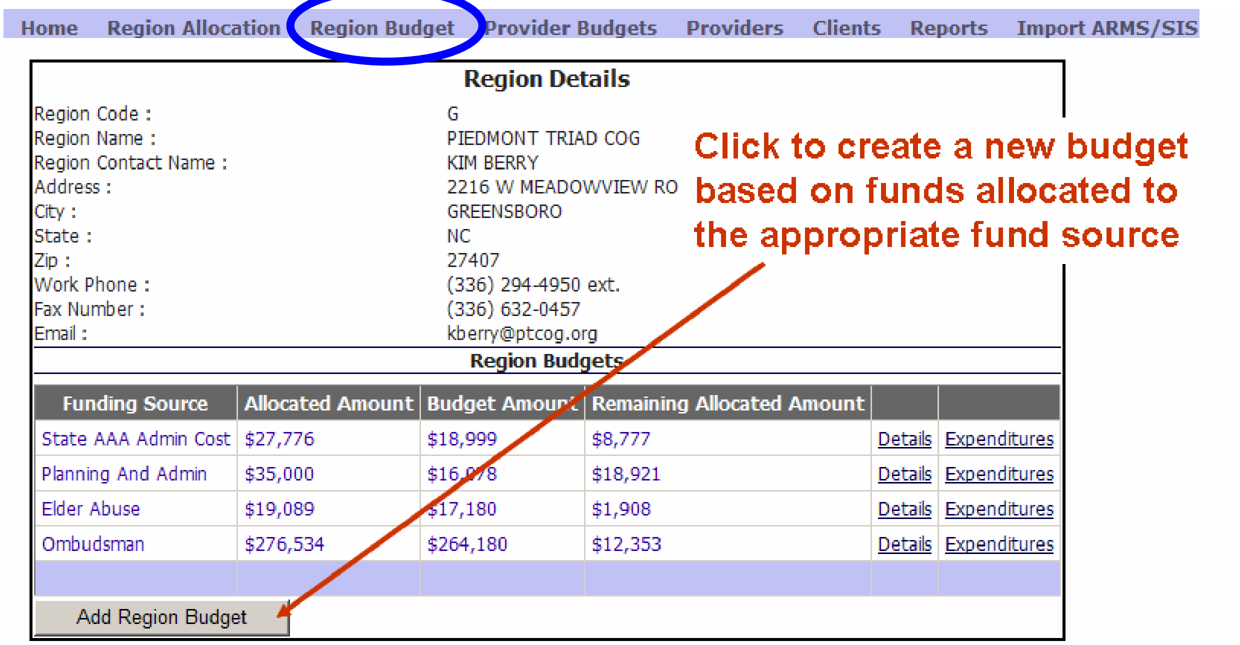
Update cancel

Figure 10 – Modify Region Contact Information

Make any changes in the form editable fields, then click **Update** to save. Click **Cancel** to return to the previous screen without saving.

2.4 Region Budget

Click on **Region Budget** on the navigation bar to view the regional budgets associated with the Region.

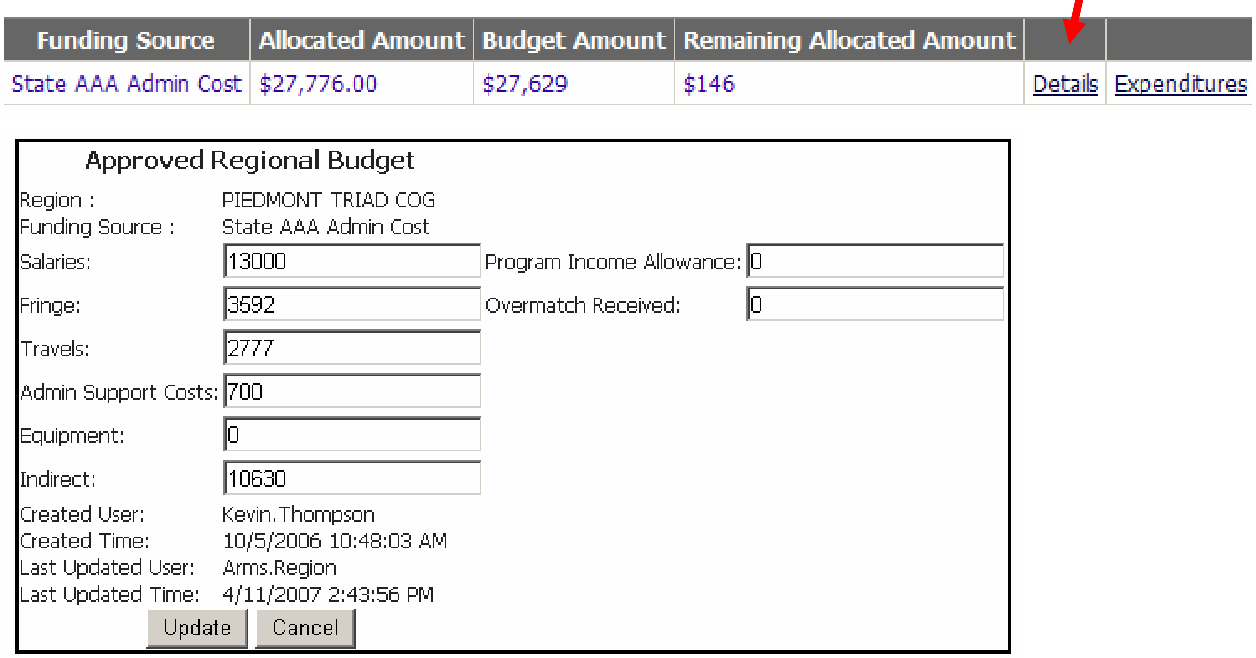


Funding Source	Allocated Amount	Budget Amount	Remaining Allocated Amount		
State AAA Admin Cost	$27,776	$18,999	$8,777	Details	Expenditures
Planning And Admin	$35,000	$16,078	$18,921	Details	Expenditures
Elder Abuse	$19,089	$17,180	$1,908	Details	Expenditures
Ombudsman	$276,534	$264,180	$12,353	Details	Expenditures

Figure 11 – Region Budget Screen (Sample)

2.4.1 View / Modify Regional Budget Details and Expenditures

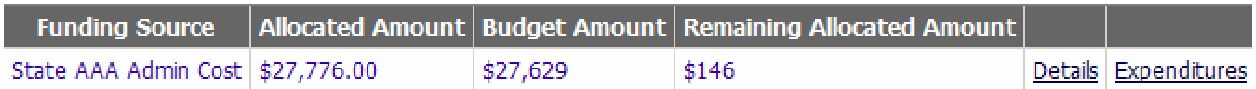
Details for each budget are available for viewing by clicking the **Details…** hyperlink. For example, details for the **State AAA Admin Cost** are:



Funding Source	Allocated Amount	Budget Amount	Remaining Allocated Amount		
State AAA Admin Cost	$27,776.00	$27,629	$146	Details	Expenditures

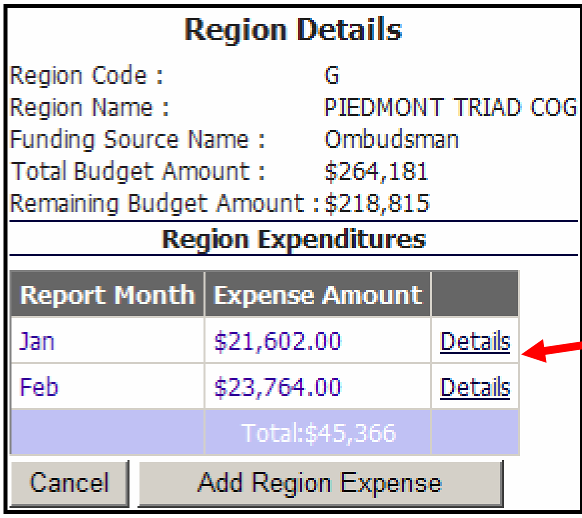
Figure 12 – Sample Regional Budget Details

Region users may change any editable fields in this form. Click **Update** to save the changes or **Cancel** to return to the previous screen.



Funding Source	Allocated Amount	Budget Amount	Remaining Allocated Amount		
State AAA Admin Cost	$27,776.00	$27,629	$146	Details	Expenditures

To view expenditure details, click the **Expenditures…** link:



Region Details

Region Code : G
Region Name : PIEDMONT TRIAD COG
Funding Source Name : Ombudsman
Total Budget Amount : $264,181
Remaining Budget Amount : $218,815

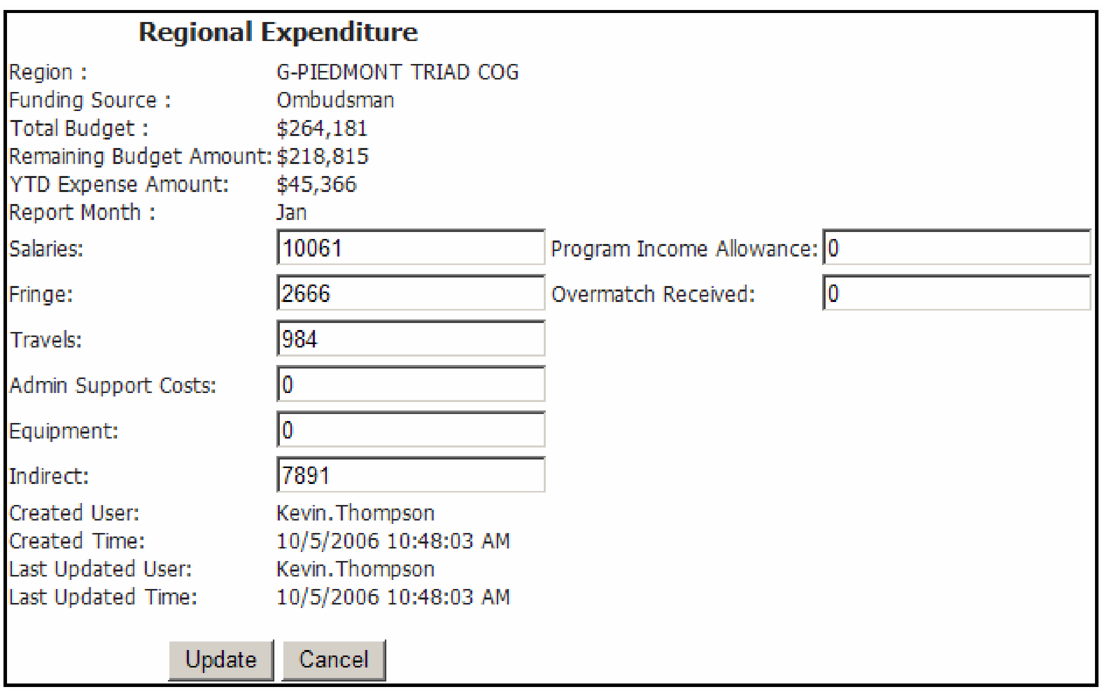
Region Expenditures

Report Month	Expense Amount	
Jan	$21,602.00	Details
Feb	$23,764.00	Details
	Total:$45,366	

Cancel | Add Region Expense

Figure 13 – Sample Expenditure Details

From this screen Region users may view or edit monthly details for expenditures by clicking **Details…** The details for January in this example:



Regional Expenditure

Region : G-PIEDMONT TRIAD COG
Funding Source : Ombudsman
Total Budget : $264,181
Remaining Budget Amount: $218,815
YTD Expense Amount: $45,366
Report Month : Jan
Salaries: 10061 | Program Income Allowance: 0
Fringe: 2666 | Overmatch Received: 0
Travels: 984
Admin Support Costs: 0
Equipment: 0
Indirect: 7891
Created User: Kevin.Thompson
Created Time: 10/5/2006 10:48:03 AM
Last Updated User: Kevin.Thompson
Last Updated Time: 10/5/2006 10:48:03 AM

Update | Cancel

Figure 14 – Sample Regional Expenditures by Month

Users may change the allocations in editable fields and click **Update** to save or **Cancel** to return to the previous screen.

Funding Source	Allocated Amount	Budget Amount	Remaining Allocated Amount		
State AAA Admin Cost	$27,776.00	$27,629	$146	Details	Expenditures

Users may add new regional expenses by clicking the **Add Regional Expense** on the **Regional Expenditures** Details screen:

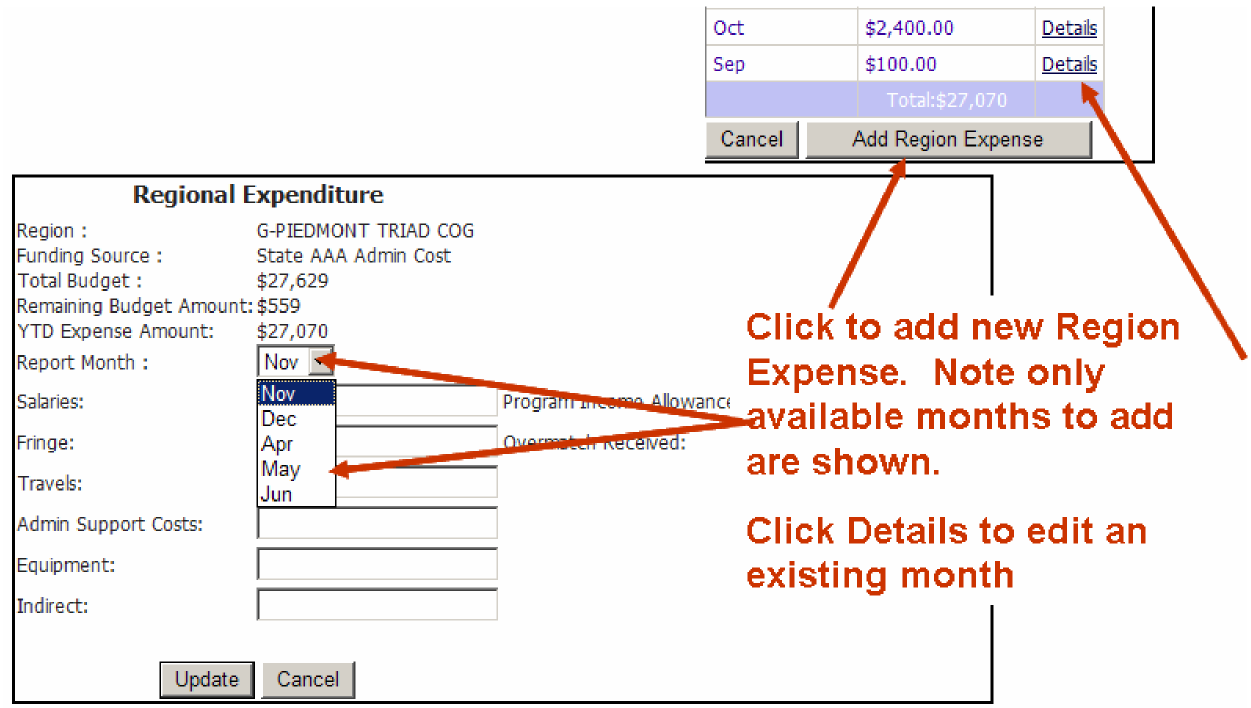


Figure 15 – Add Regional Expenditure (from Details screen)

Users may add the expenditures in editable fields and click **Update** to save or **Cancel** to return to the previous screen.

Expenditures may also be added to the regional budget by clicking the **Add Regional Expense** button located on the main **Region Budget** screen.

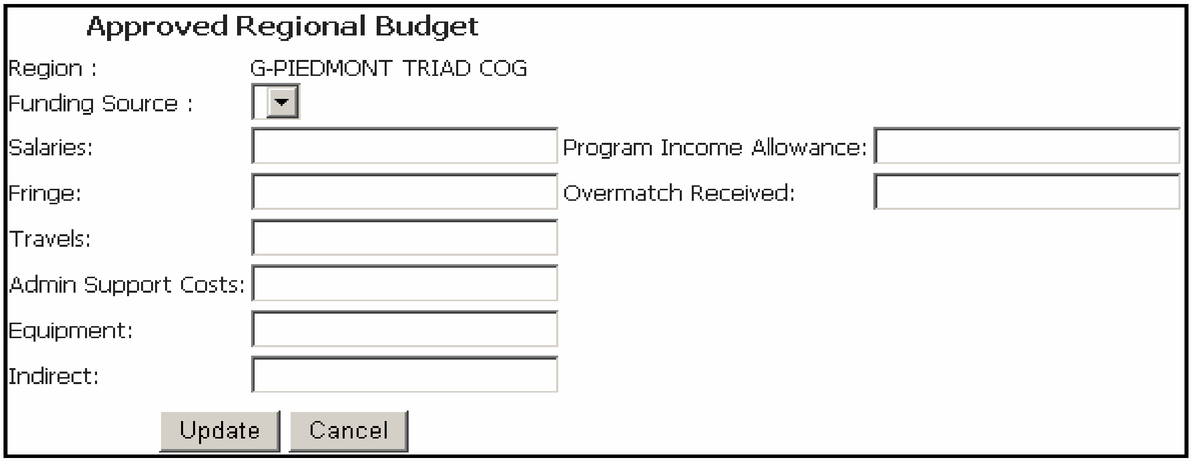


Figure 16 – Add Regional Expenditure (from Regional Budget screen)

Complete the form editable fields. Click **Update** to save or **Cancel** to return to the previous screen.

> **NOTE**: There are slight differences between these two forms (As shown in **Figure 15 – Add Regional Expenditure (from Details screen)** and Figure 16 – Add Regional Expenditure (from Regional Budget screen) because they each originate from a different place in the Regional budget hierarchy.

2.5 Provider Budgets

2.5.1 Add Provider Budgets

Click Add Provider Budget to set up a new budget or provider contract segment.

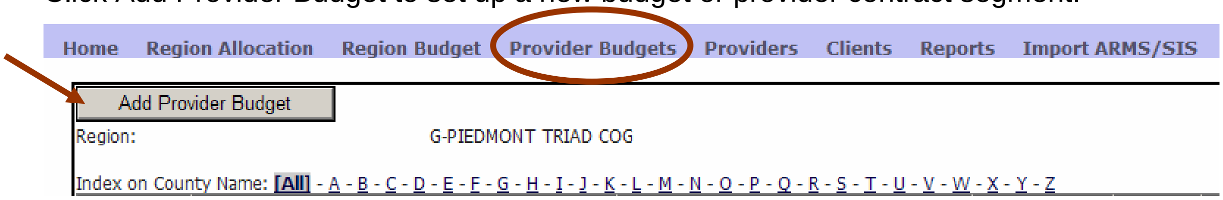
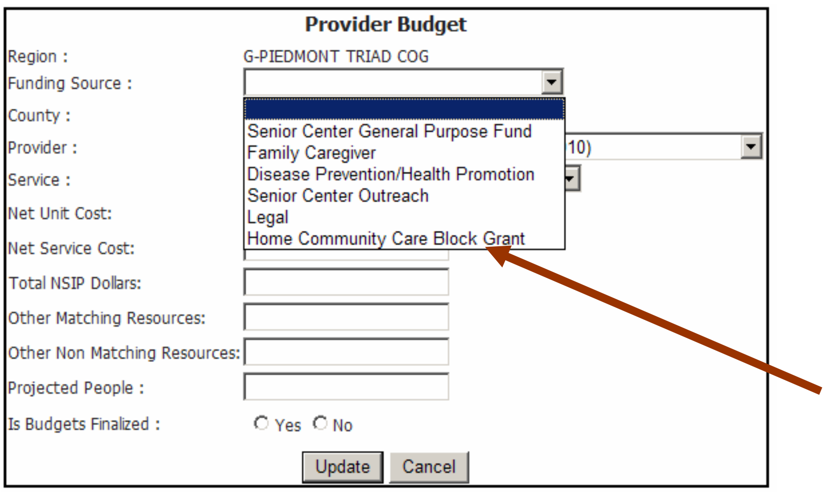


Figure 17 – Add Provider Budget

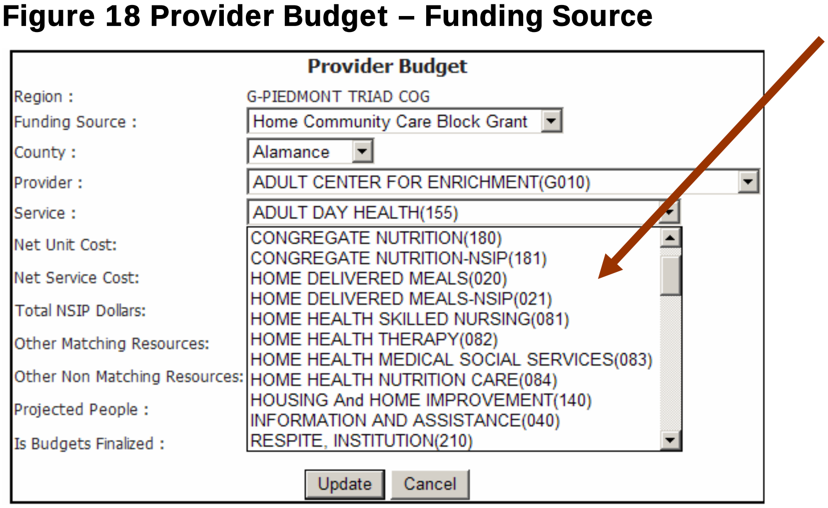
The region code and name cannot be changed and is filled in based on user access. The user should select the Funding Source by clicking this symbol - . A drop down box will display with available funding sources. Available services will display based on the Funding Source selected from the drop down menu.



In this example, Home and Community Care Block Grant was selected as the Funding Source.

When you click on Service, only services tied to funding source Home and Community Block Grant can be selected.

Figure 18 Provider Budget – Funding Source



Note: Services are available by Funding Service

Figure 19 – Provider Budget - Service

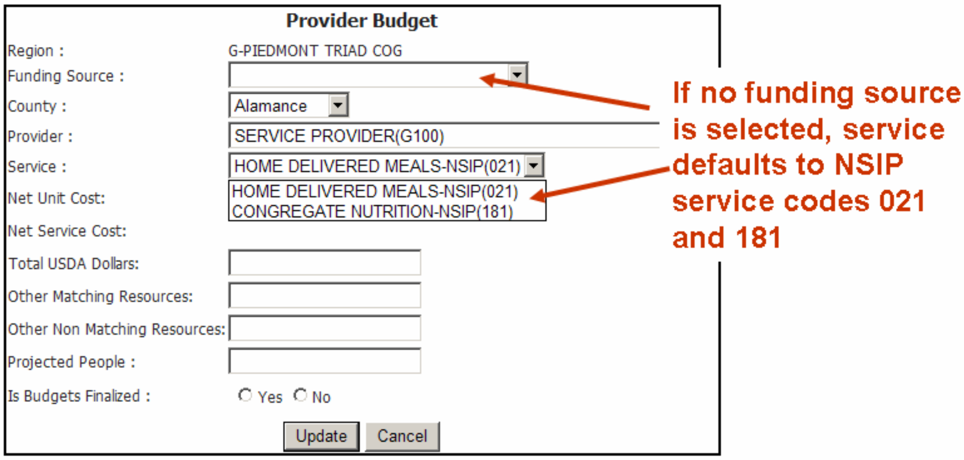


Figure 20 Provider Budget – NSIP

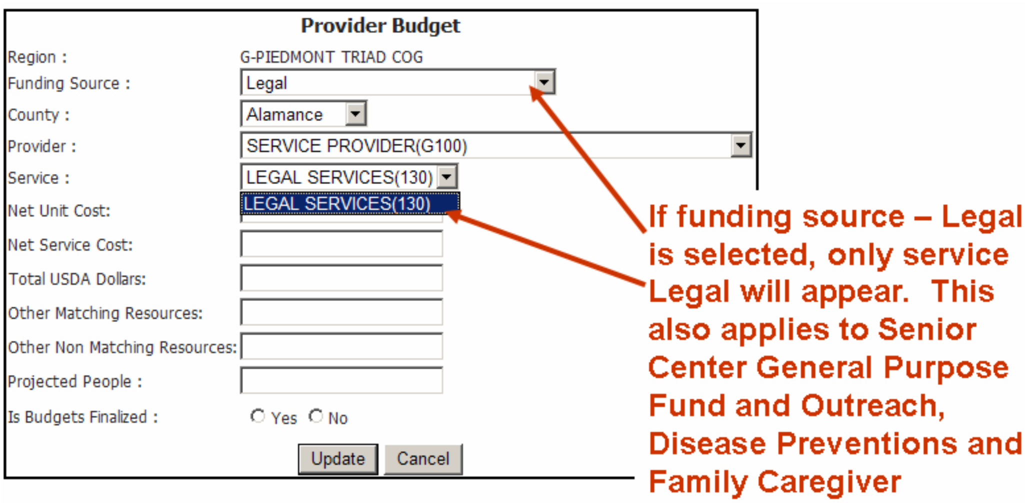


Figure 21 Provider Budget - Legal

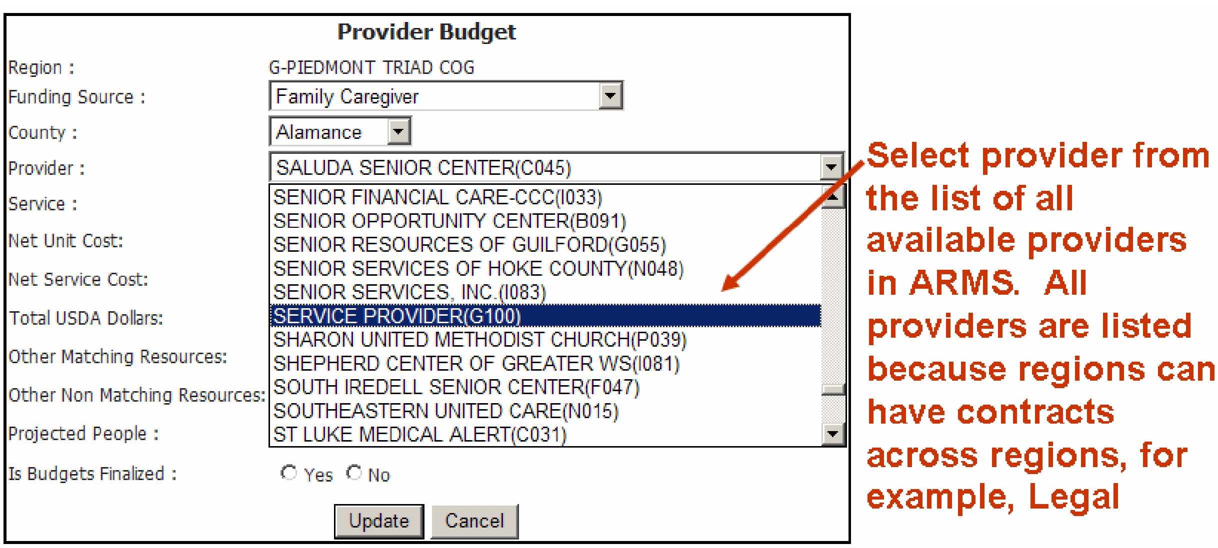


Figure 22 – Provider Budget -Provider

Users may add the provider budget information in editable fields and click **Update** to save or **Cancel** to return to the previous screen.

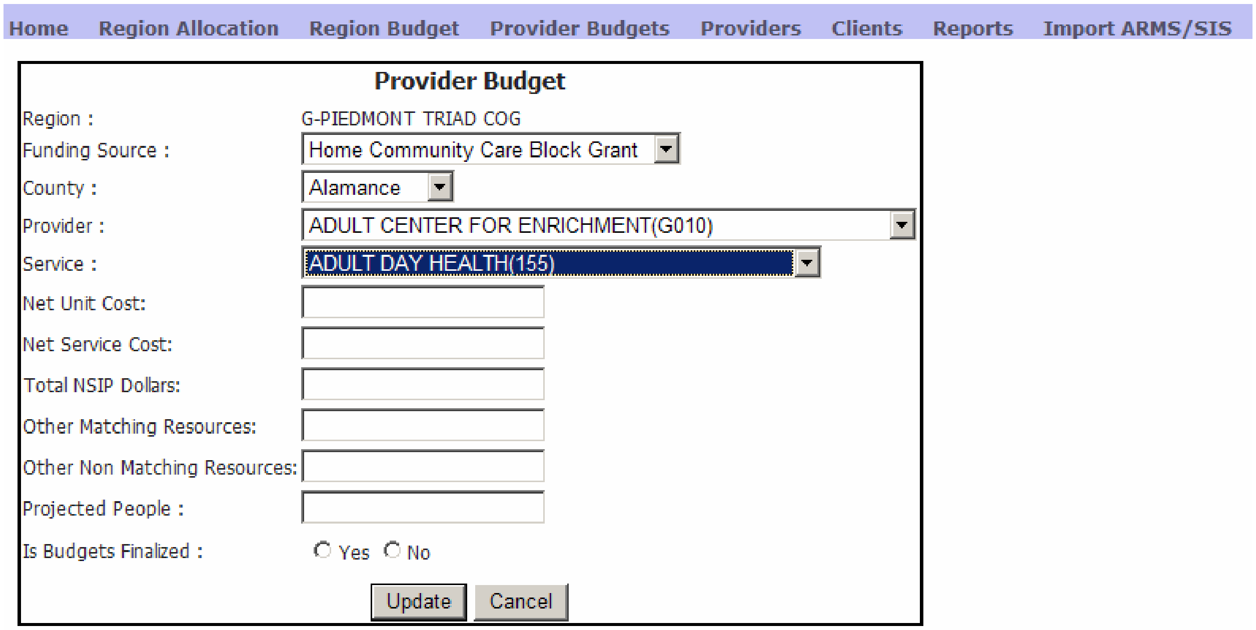
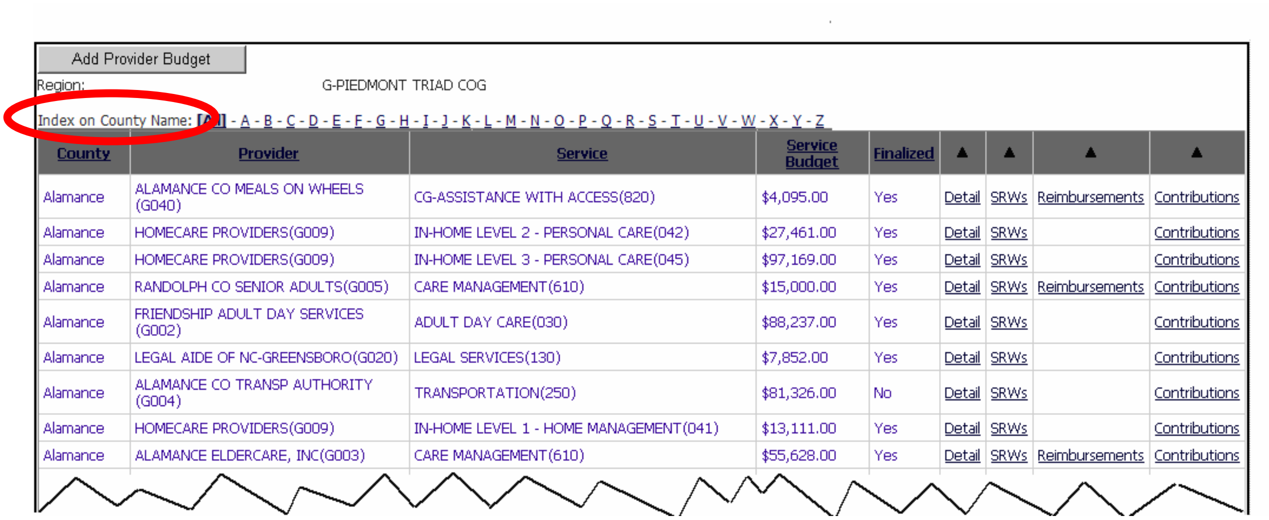


Figure 23 – Provider Budget Data Entry Screen

Instructions for Data Entry in Figure 24	
Net Unit Cost	Net Unit Cost is used in calculating actual expenses for unit-based expenses.
Net Service Cost	The Net Service Cost is the actual budgeted amount – Federal/State/Local
Total NSIP Dollars	NSIP – *Optional Entry* for NSIP Only Service Codes
Other Matching Resources	Other matching resources received – *Optional Entry*
Other Non Matching Resources	Other non-matching resources received – *Optional Entry*
Projected People	Number of people this provider expects to serve this year. This number is **NOT** used in calculating expenses.
Is Budget Finalized	Check Yes or No to show whether budget if finalized and/or verified

2.5.2 Viewing / Modifying Provider Budget Information

Click on **Provider Budgets** to view the complete list of Provider Budgets/Contract Segments for the Region: A linked index bar is available to help users find Providers by County order.



County	Provider	Service	Service Budget	Finalized	▲	▲	▲	▲
Alamance	ALAMANCE CO MEALS ON WHEELS (G040)	CG-ASSISTANCE WITH ACCESS(820)	$4,095.00	Yes	Detail	SRWs	Reimbursements	Contributions
Alamance	HOMECARE PROVIDERS(G009)	IN-HOME LEVEL 2 - PERSONAL CARE(042)	$27,461.00	Yes	Detail	SRWs		Contributions
Alamance	HOMECARE PROVIDERS(G009)	IN-HOME LEVEL 3 - PERSONAL CARE(045)	$97,169.00	Yes	Detail	SRWs		Contributions
Alamance	RANDOLPH CO SENIOR ADULTS(G005)	CARE MANAGEMENT(610)	$15,000.00	Yes	Detail	SRWs	Reimbursements	Contributions
Alamance	FRIENDSHIP ADULT DAY SERVICES (G002)	ADULT DAY CARE(030)	$88,237.00	Yes	Detail	SRWs		Contributions
Alamance	LEGAL AIDE OF NC-GREENSBORO(G020)	LEGAL SERVICES(130)	$7,852.00	Yes	Detail	SRWs		Contributions
Alamance	ALAMANCE CO TRANSP AUTHORITY (G004)	TRANSPORTATION(250)	$81,326.00	No	Detail	SRWs		Contributions
Alamance	HOMECARE PROVIDERS(G009)	IN-HOME LEVEL 1 - HOME MANAGEMENT(041)	$13,111.00	Yes	Detail	SRWs		Contributions
Alamance	ALAMANCE ELDERCARE, INC(G003)	CARE MANAGEMENT(610)	$55,628.00	Yes	Detail	SRWs	Reimbursements	Contributions

Figure 24 – Provider Budgets per Region

Simply click on any of the letters in the bar to index on County Name beginning with that letter.
Click the heading link for additional sort order

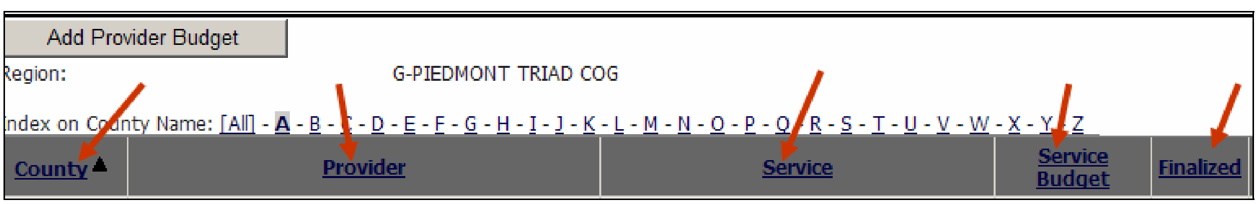


Figure 25 - Additional Sort Orders

On the Provider Budgets screen the user have four links to choose from:

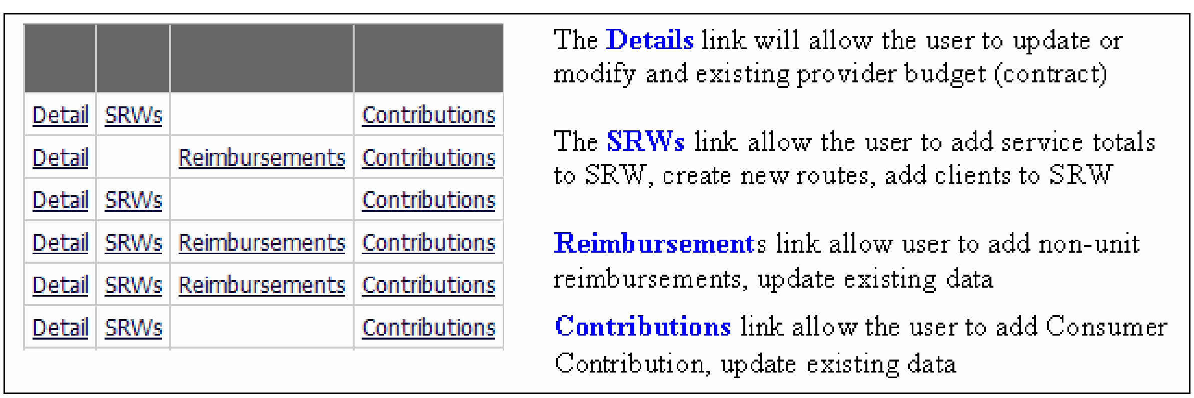


Figure 26 – Provider Budget Links

2.5.3 View / Edit Provider Budget Details

Click on the **Detail** link to view or edit Provider budget details. Users can edit only amounts in editable fields. Click **Update** to save or **Cancel** to return to the previous screen.

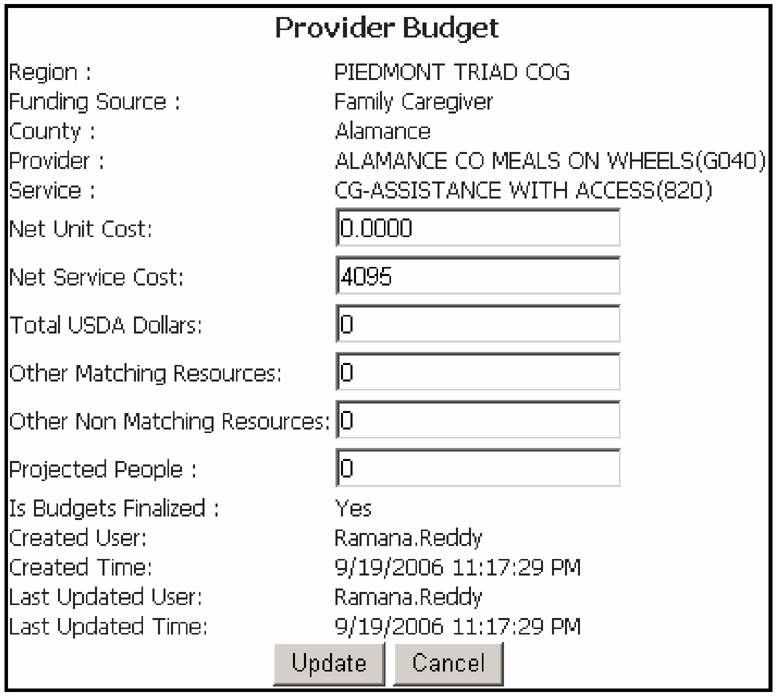


Figure 27 – Provider Budget Details

2.5.4 View / Edit Provider Budget SRWs

NOTE: Identical functionality for this feature is available for Provider users.

Click on the **SRWs** link to view Site/Route/Workers details (See Figure 24). The following screen appears:

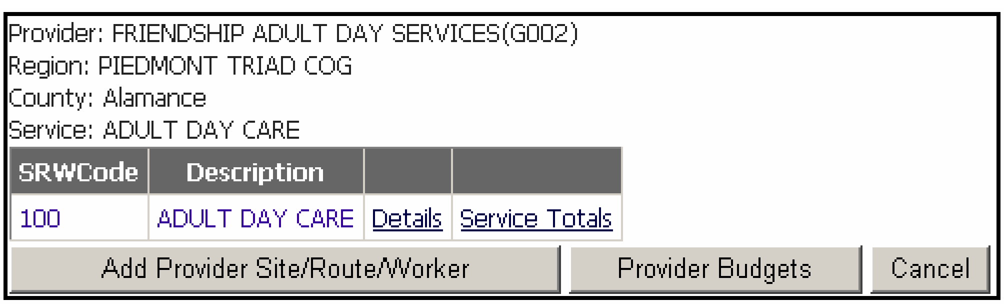


Figure 28 – Site / Route / Workers Details

All the Site/Route/Workers associated with this Provider will appear, so the list may be long. Click on **Provider Budgets** or **Cancel** to return to the previous screen.

Click on the **Add Provider Site/Route/Worker** button (see Figure 29) to add a new SRW for this provider.

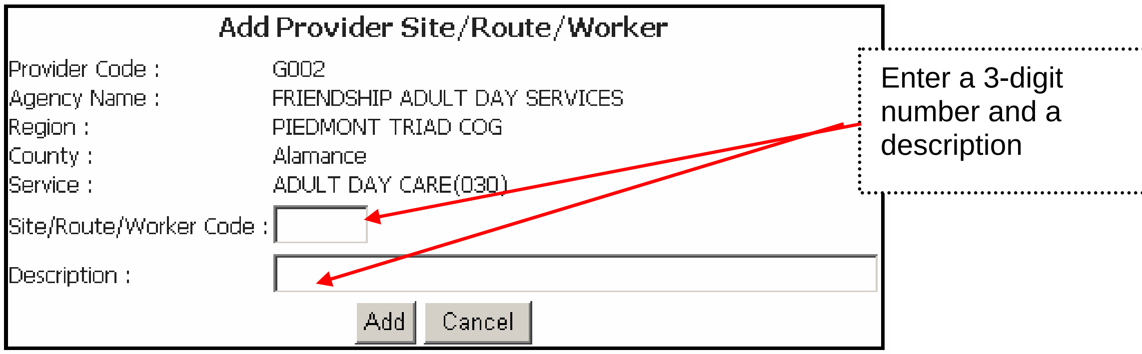


Figure 29 – Add Site / Route / Worker

Users may add the information in the two editable fields. Click **Add** to save or **Cancel** to return to the previous screen.

The **SRW Details** screen provides two additional links for more information. Click on **Details** (see Figure 29) to view the clients assigned to this route and a list of Clients that can be assigned this SRW. Select the name from the list, click **Add** and then click **Update** to Save. Click **Cancel** to return to previous screen.

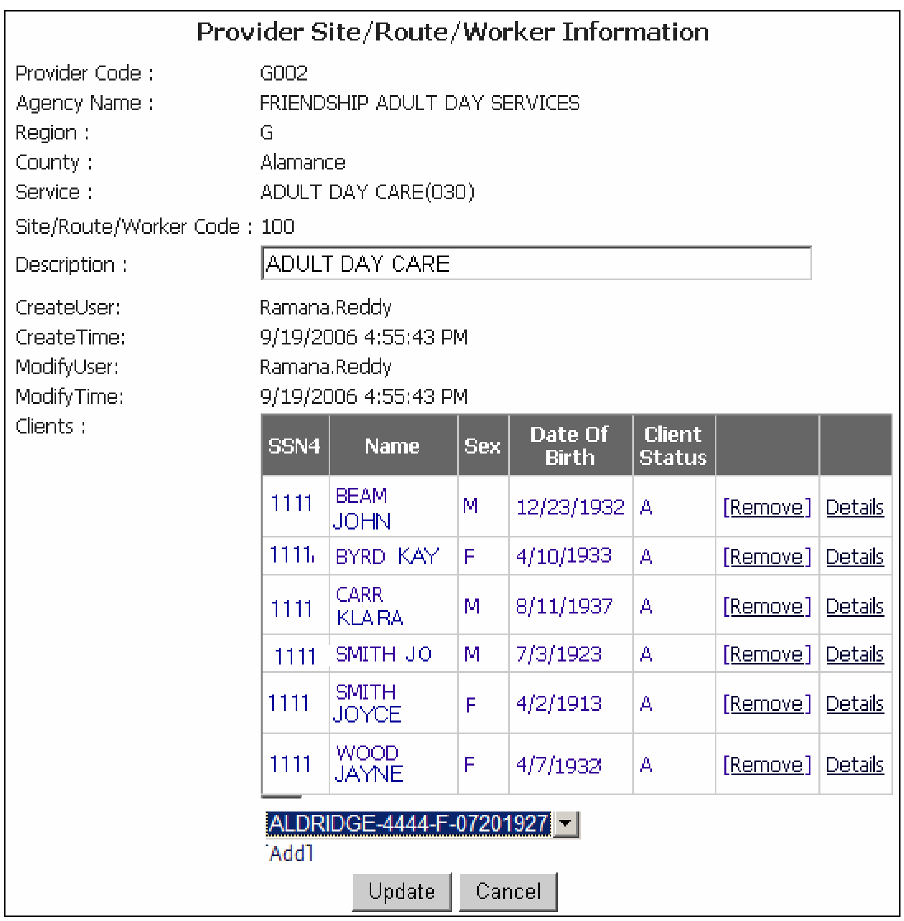


Figure 30 – SRW Additional Details

To view details for a client, click the **Details** link to view the **SRW Service Totals** an individual client.

Provider Site/Route/Worker Service Totals

Provider: FRIENDSHIP ADULT DAY SERVICES(G002) Region - County : G - Alamance
Service : ADULT DAY CARE(030) [Maximum monthly units: 0] Site/Route/Worker : 100 - ADULT DAY CARE

SSN4	Name	Status	Date Of Birth	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Total
1111	BEAM JOHN	A	12/23/1933	20	23											43
				20	23	0	0	0	0	0	0	0	0	0	0	43

Verify | Update | Provider Budgets | Cancel

Figure 31—Service Details (from Site / Route / Worker)

Users can add or edit the monthly totals for the client on Provider Site/Route/Worker Service Totals screen in any month. Click one of the four buttons to:

- **Verify** to recalculate the Totals.
- **Update** to save the changes
- **Provider** Budgets to return to the Provider Budgets screen without saving
- **Cancel** to return to the previous screen without saving

Users can click **[Remove]** ***permanently remove*** a client from a provider S/R/W list only if the client does not have service totals. The user will have to make the client inactive if they do not want to add additional service totals amounts.

From the Site/Route/Worker initial screen

Provider: ALAMANCE COUNTY TRANSPORTATION AUTHORITY(G004)
Region: PIEDMONT TRIAD COG
County: Alamance
Service: TRANSPORTATION

SRWCode	Description		
100	TRANSIT BUS	Details	Service Totals
401	GENERAL TRANSP	Details	Service Totals
455	RALEIGH EAST SIDE	Details	Service Totals
501	SHAW TOWN COMMUNITY	Details	Service Totals
555	BURLINGTON PLACE	Details	Service Totals

Add Provider Site/Route/Worker | Provider Budgets | Cancel

(
Figure 68) users may also click on **Service Totals** to go directly to the Service Totals Report screen.

2.5.5 View / Edit Provider Budget Reimbursements

Click the **Reimbursements** link to add, edit or view Provider Non-Unit Reimbursements data.

Provider Non-Unit Reimbursements

Region : PIEDMONT TRIAD COG County : Alamance
Provider: ALAMANCE ELDERCARE, INC(G003) Service: CARE MANAGEMENT(610)

Report Month	Admin Direct Cost	Admin Indirect Cost	Program Cost	Total Non Unit Reimbursement	
Jul	$2,182.00	$0.00	$2,680.00	$4,862.00	Detail
Aug	$2,182.00	$0.00	$5,352.00	$7,534.00	Detail

Cancel | Add Non Unit Reimbursement | Provider Budgets

Figure 32 – View / Edit Provider Budget Reimbursements

Click **Add Non Unit Reimbursement** to add a monthly non-unit reimbursement record.

Choose the correct month from the drop-down and complete the editable fields. Click **Add** to save the information or **Cancel** to exit without saving.

> **NOTE**: Only whole numbers should be entered in the monetary fields. If the user key amounts with decimal the system will automatic round up or down.

To view the existing non-unit reimbursement information for any month, click the appropriate **Detail** link.

Amounts can be keyed into the Administrative Direct Cost, Administrative Direct Cost and/or Program Cost fields.

When complete, click **Update** to save or click **Cancel** to return to the previous screen.

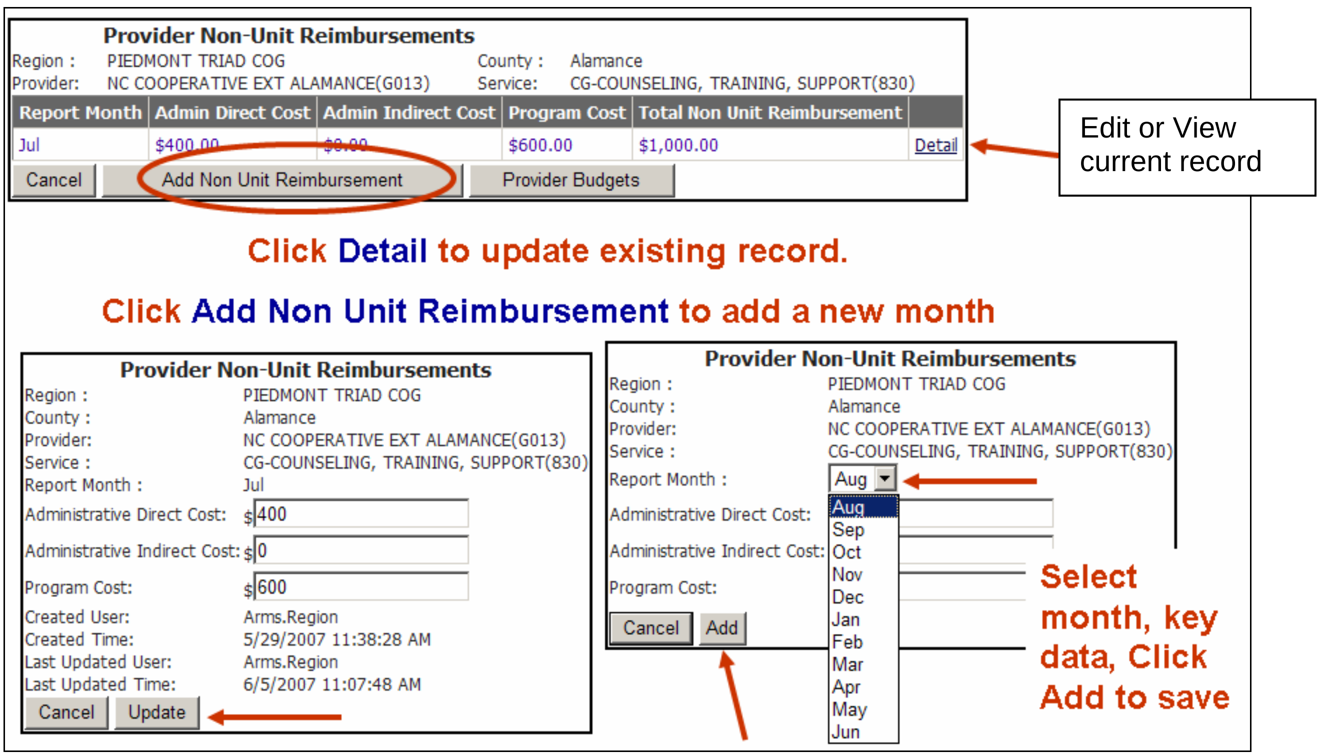


Figure 33 – Add / Edit Non-Unit Reimbursement

2.5.6 View / Edit Provider Budget Contributions

Click **Contributions** to add, edit or view Provider Consumer Contribution/Program Income. Click the **Add Consumer Contribution** button to **Add** a new month. Click **Detail** to edit or view a current month.

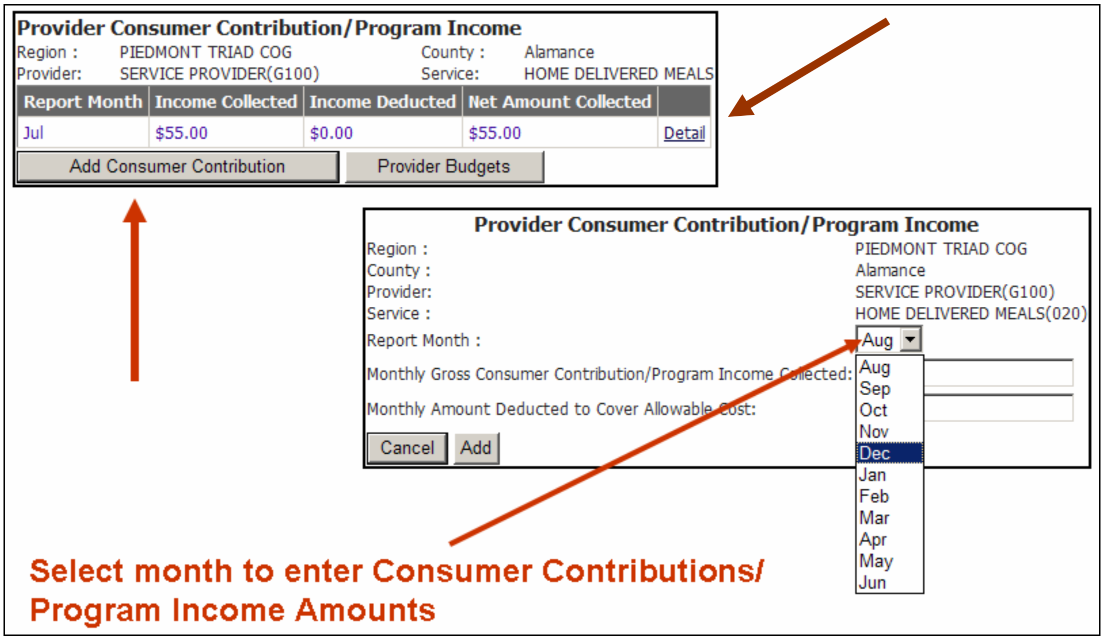


Figure 34 – Add Provider Contributions / Program Income

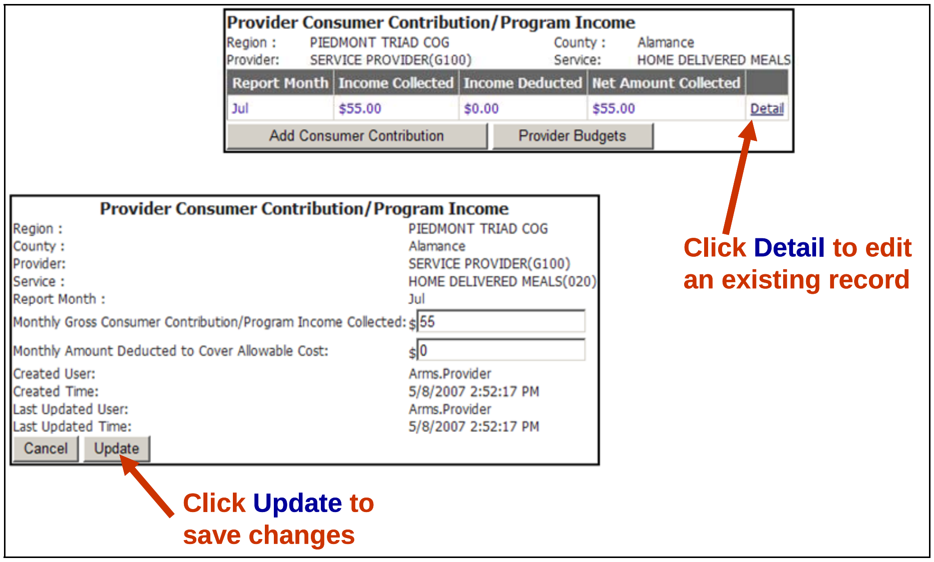


Figure 35 – Edit / View Provider Contributions / Program Income

Click **Detail** to edit or view existing record. Click **Add** to save or **Cancel** to return to the previous screen without saving. Click **Provider Budgets** to return to the budget list.

3 Providers

To view list Provider Agencies, click on the **Providers** link on the navigation bar. A list of provider agencies will display.

Users can list all providers by selecting the **All** link or users may narrow the list by clicking on the letter links in the index bar across the top to sort by **Agency Name**. Additional sorting can be done by clicking on the column headings. For example, to sort by City, click the column heading **City**.

Home Region Allocation Region Budget Provider Budgets Providers Clients Reports Import ARMS/SIS

Index on Agency Name: [All] - A - B - C - D - E - F - G - H - I - J - K - L - M - N - O - P - Q - R - S - T - U - V - W - X - Y - Z

Code	Agency	Status	Address	City	▲	▲
G002	FRIENDSHIP ADULT DAY SERVICES	A	1946 Martin Street	BURLINGTON	Details...	Clients...
G003	ALAMANCE ELDERCARE, INC	A	2732 Anne Elizabeth Drive	BURLINGTON	Details...	Clients...
G004	ALAMANCE COUNTY TRANSPORTATION AUTHORITY	A	PO BOX 2746	BURLINGTON	Details...	Clients...
G005	RANDOLPH CO SENIOR ADULTS	A	133 W WAINMAN AVENUE	ASHEBORO	Details...	Clients...
G007	LIFE CENTER OF DAVIDSON	A	601 W. Center Street	LEXINGTON	Details...	Clients...
G008	HOME HEALTH RANDOLPH HOSPITAL	A	PO BOX 1048	ASHEBORO	Details...	Clients...
G009	HOMECARE PROVIDERS	A	PO BOX 205	BURLINGTON	Details...	Clients...
G010	ADULT CENTER FOR ENRICHMENT	A	122 N ELM STREET	GREENSBORO	Details...	Clients...
G012	NC COOPERATIVE EXT RANDOLPH	A	2222-A S FAYETTEVILLE ST	ASHEBORO	Details...	Clients...
G013	NC COOPERATIVE EXT ALAMANCE	A	209 N GRAHAM-HOPEDALE RD	BURLINGTON	Details...	Clients...
G014	UNITED WAY OF RANDOLPH COUNTY	A	PO BOX 2822	ASHEBORO	Details...	Clients...
G015	NC COOPERATIVE EXT MONTGOMERY	A	203 W MAIN ST	TROY	Details...	Clients...
G018	CASWELL COUNTY	A	PO BOX 1405	YANCEYVILLE	Details...	Clients...
G020	LEGAL AIDE OF NC-GREENSBORO	A	PO BOX 3467	GREENSBORO	Details...	Clients...

Figure 36 – Providers Associated with a Region

Provider codes consist of the Region code and a three digit numeric number. Provider Agency Codes are assigned by the ARMS Coordinator and will not change. Once a provider code is setup in ARMS it will never be assigned to another provider agency.

Status = A indicates that the provider agency is Active for the current fiscal year.

The **Details…** link will allow the user to edit or view provider agency information.

The **Clients…** link will allow the user to add, edit, or view Clients assigned to a provider agency.

3.1.1 Edit / View Provider Details

Click on Details… to edit / view Provider Agency information in the editable fields. Provider Code or Registration Date cannot be changed. The user can edit or modify any of the editable fields on this form. When complete, click **Update** to save or **Cancel** to return to the previous screen.

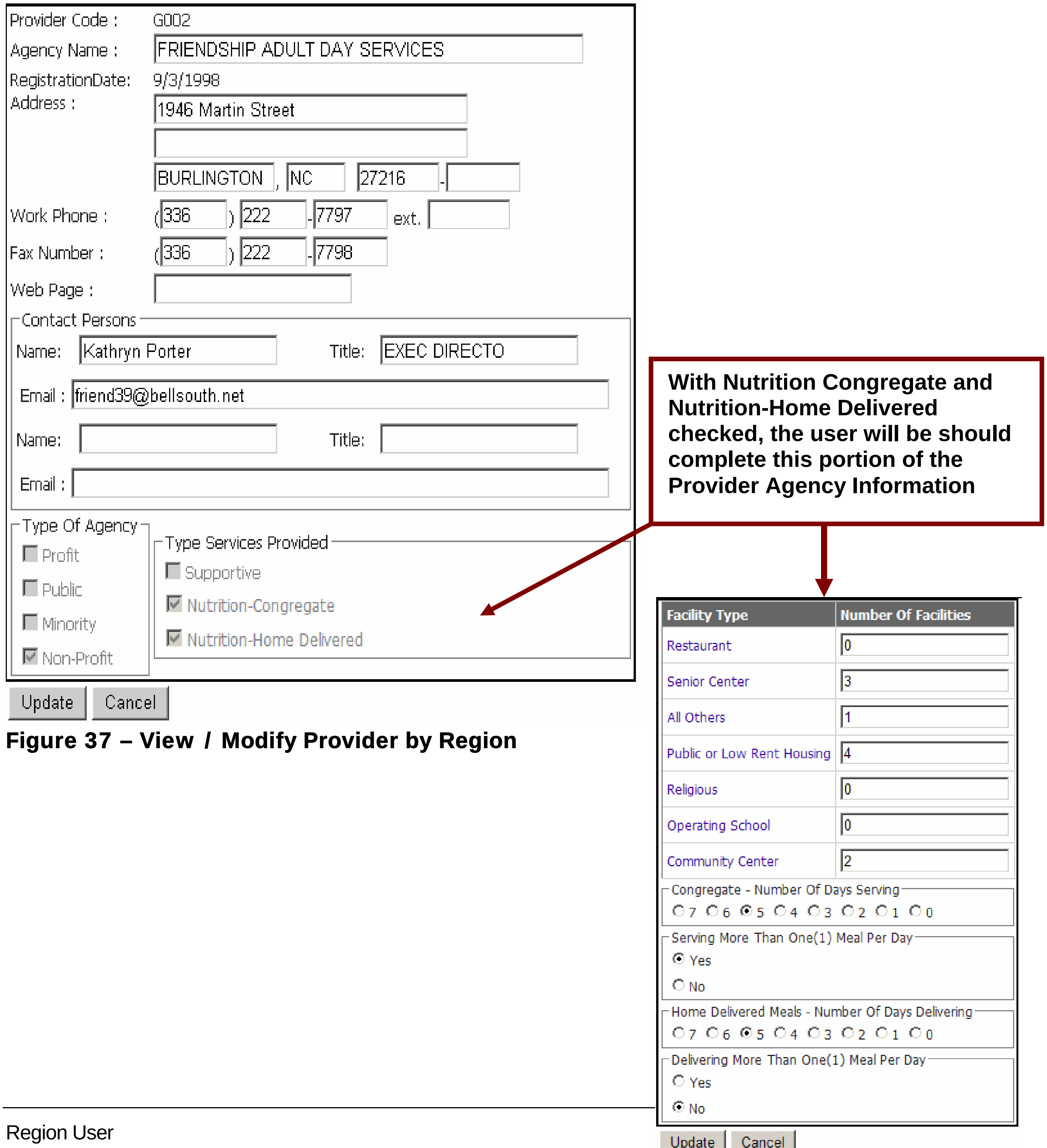
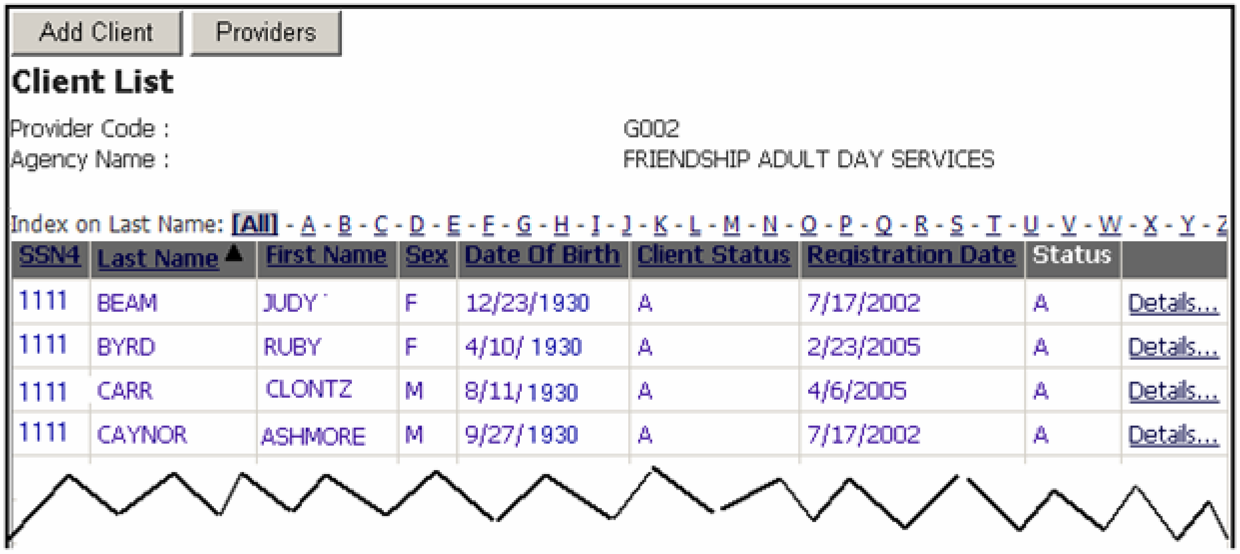


Figure 37 – View / Modify Provider by Region

3.1.2 View Clients for Region Providers

To view the list of Clients associated with a Providers, click on **Clients…** (see Figure 30) and the full client list for that Provider will appear:



SSN4	Last Name	First Name	Sex	Date Of Birth	Client Status	Registration Date	Status	
1111	BEAM	JUDY	F	12/23/1930	A	7/17/2002	A	Details...
1111	BYRD	RUBY	F	4/10/ 1930	A	2/23/2005	A	Details...
1111	CARR	CLONTZ	M	8/11/1930	A	4/6/2005	A	Details...
1111	CAYNOR	ASHMORE	M	9/27/1930	A	7/17/2002	A	Details...

Figure 38 – Client List for a Provider in a Region

To see the details for a particular Client, click the **Details….** link to open the Clients Detail screen, which allows the Region user to perform all the same functions as described in the Provider User Section on Client Information.

Region users may also add a new Client by clicking on Add Client .

To return to the list of all Providers click on either the **Providers** link on the navigation bar or the Providers Button.

3.2 Clients

Refer to Provider User Section on **Client Information**.

3.3 Provider User

The information in this section is applicable to those users who have been assigned the Provider role..

3.4 Provider Initial Screen

Users assigned the **Provider** role will see a startup screen similar to the one below.

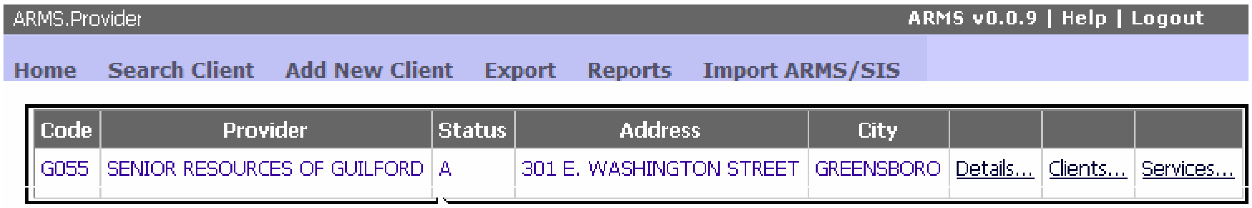


Figure 39 – Provider User Initial Screen

Each Provider has a unique alphanumeric ID which will never be assigned to another Provider. Therefore, each Provider User will see the initial screen with different contents in the table.

> **NOTE**: The hyperlinks on this page include the navigation bar titles (**Home, Search Client, Add New Client**, **Reports,** and **Import ARMS/SIS**) and the words on the right-most columns of the table (**Details…Clients… Services…**).

3.5 Agency Information

This initial screen for the sample Provider User shows that this user has access to Provider agencies G055, Senior Resources of Guilford.

> **NOTE**: The left side of the system header will always display the name of the user who is currently logged into ARMS. The screen above displays "ARMS.Provider." This is the user name created for documentation purposes.

Additional information about each agency may be obtained by clicking one of the hyperlinks in the columns to the right. For example, to view more details about "Senior Resources of Guilford" follow these steps:

From the initial screen, click on the **Details…** link on the right.

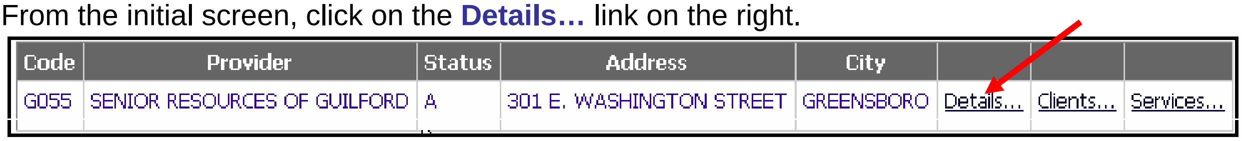
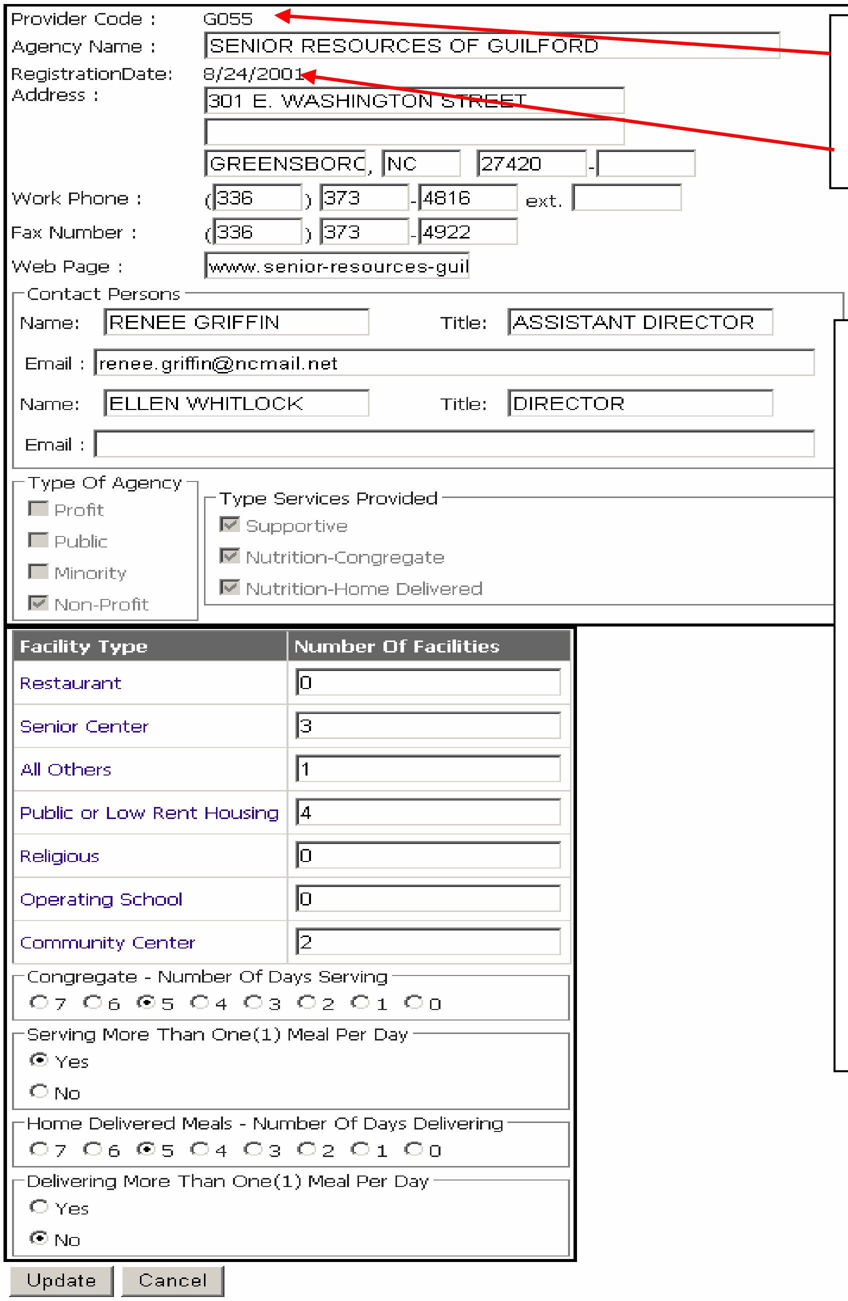


Figure 40 – Provider Agency Information

The following screen will display. Make the necessary changes and click the **Update** button at the bottom of the screen. Click **Cancel** to abort any changes and/or to return to previous page.



Unique ID (Assigned by DAAS and cannot be changed). The registration date cannot be changed.

Provider Agency Codes are assigned by DAAS ARMS Coordinator and cannot be changed.

Only Regional Staff can request provider agencies access to ARMS using the DAAS-150 Form.

Provider codes consist of the Region code and a three digit numeric number. In this example, the provider code is G055. This user's profile has been set up to access a provider in Region G.

Only active providers with current budgets with AAA will have access to ARMS for the current fiscal year.

Figure 41 – Provider Agency Detailed Screen

If any changes are required to agency details, simply make them in any editable box or field, then click **Update** at the bottom of the screen. Click **Cancel** to discard any changes or to return to the previous screen.

3.6 Client Information

Provider users may view or modify client information using either of two methods:

ONE: By clicking on the **Clients…** link on the initial screen and selecting the desired client from the resulting list (which is the method followed in the example below).

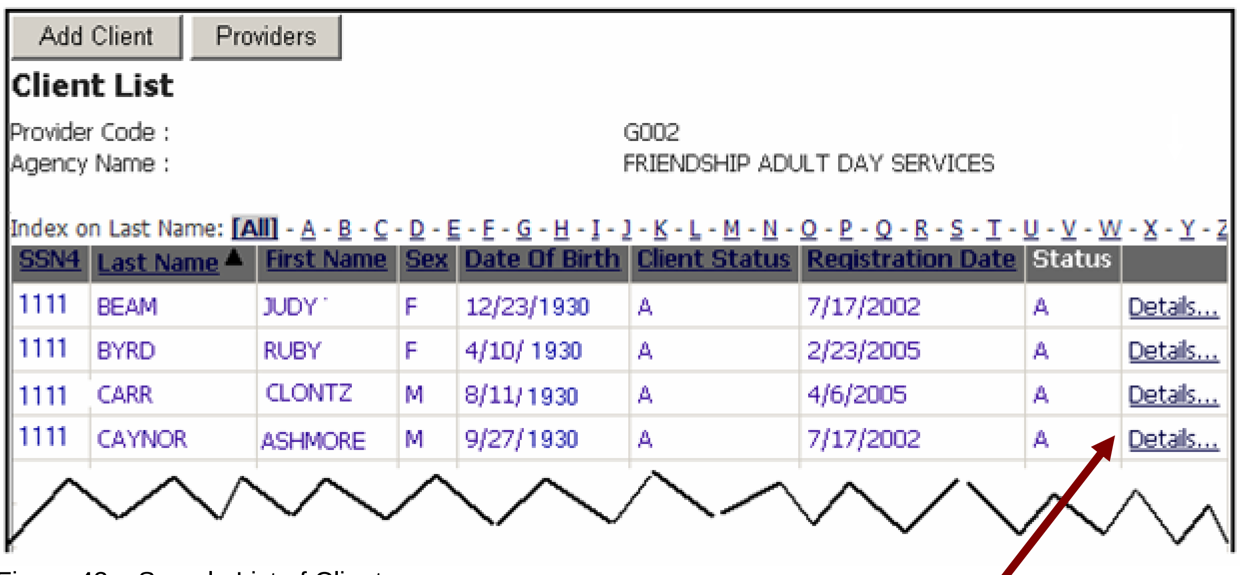
TWO: By searching directly for a client using the **Search Client** link on the ARMS system header bar. The search client screen also appears in ARMS to locate a specific client for viewing/editing.

To view list of clients associated with the “Senior Resources of Guilford” click on the **Clients…** link on the right side of the table.

Code	Provider	Status	Address	City			
G055	SENIOR RESOURCES OF GUILFORD	A	301 E. WASHINGTON STREET	GREENSBORO	Details...	Clients...	Services...

Figure 42 – Sample List of Agencies

The **Client List** for that agency will appear:



Add Client | Providers

Client List

Provider Code : G002
Agency Name : FRIENDSHIP ADULT DAY SERVICES

Index on Last Name: [All] - A - B - C - D - E - F - G - H - I - J - K - L - M - N - O - P - Q - R - S - T - U - V - W - X - Y - Z

SSN4	Last Name	First Name	Sex	Date Of Birth	Client Status	Registration Date	Status	
1111	BEAM	JUDY	F	12/23/1930	A	7/17/2002	A	Details...
1111	BYRD	RUBY	F	4/10/ 1930	A	2/23/2005	A	Details...
1111	CARR	CLONTZ	M	8/11/1930	A	4/6/2005	A	Details...
1111	CAYNOR	ASHMORE	M	9/27/1930	A	7/17/2002	A	Details...

Figure 43 – Sample List of Clients

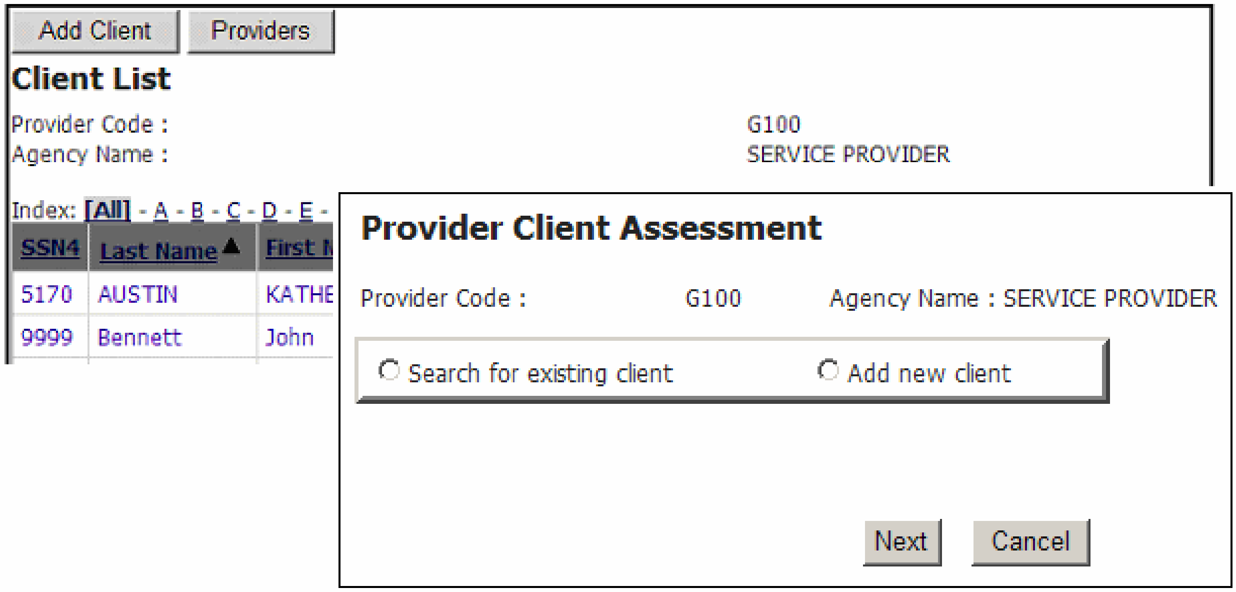
To view or edit specific details on a client (client record), click on the **Details…** link on the right. The Provider Client Details screen will appear:

ARMS makes it easier to locate clients by using an linked index bar at the top of the Client List.

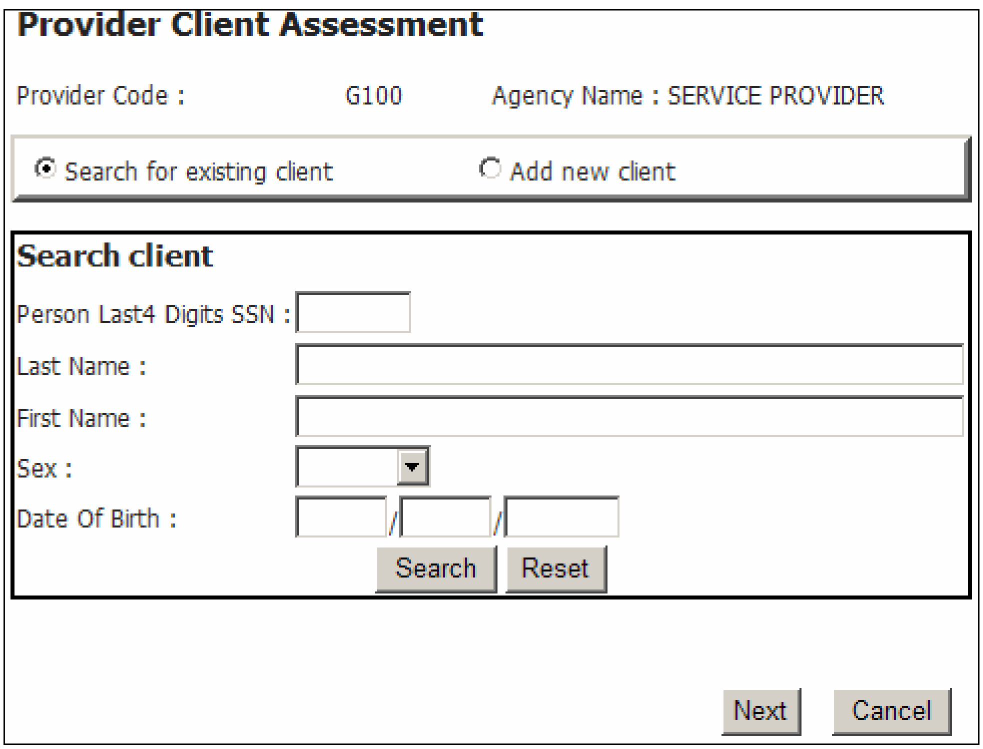
Index on Last Name: [All] - A - B - C - D - E - F - G - H - I - J - K - L - M - N - O - P - Q - R - S - T - U - V - W - X - Y - Z

Figure 44 – Provider Budget Index Bar

Click **Add Client** to **Search for existing client** or to **Add new client** to a Provider.



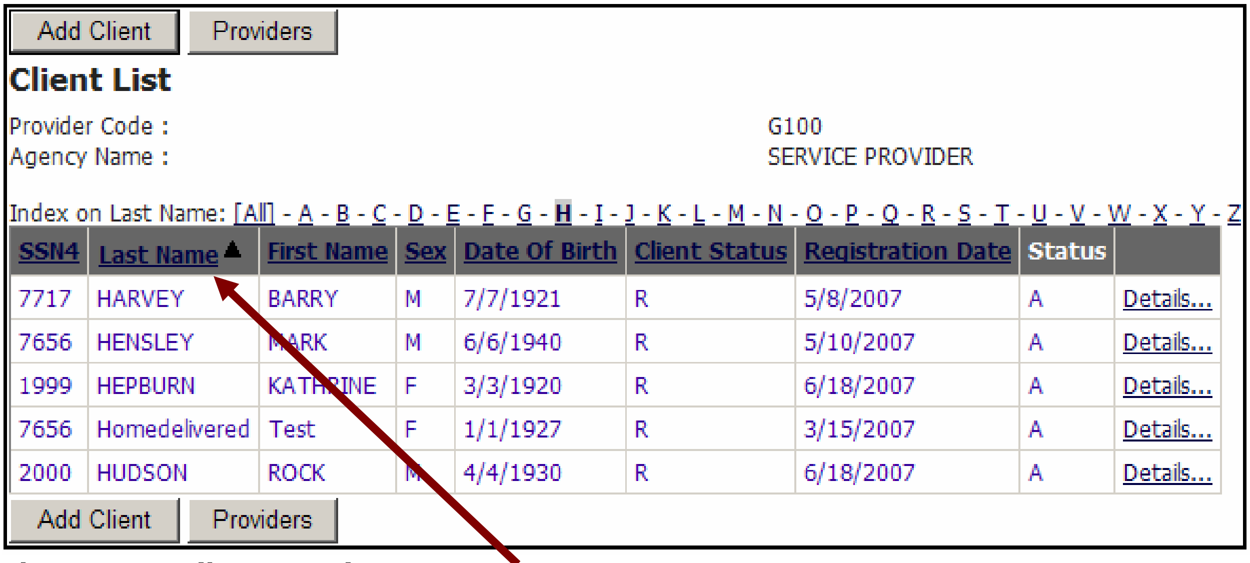
If the user click Search for existing client the following screen will prompt the user to enter search criteria. Refer to Section 3.3.2.1 for more information on searching for a client.



Valid search fields include Last4 Digits of SSN, Last Name and First Name

Date of Birth can be search in combination of the above criteria.

Simply click on any of the letters in the bar to list clients' last name beginning with that letter. Clicking the letter "H" will yield the results in the example below.



SSN4	Last Name ▲	First Name	Sex	Date Of Birth	Client Status	Registration Date	Status	
7717	HARVEY	BARRY	M	7/7/1921	R	5/8/2007	A	Details...
7656	HENSLEY	MARK	M	6/6/1940	R	5/10/2007	A	Details...
1999	HEPBURN	KATHRINE	F	3/3/1920	R	6/18/2007	A	Details...
7656	Homedelivered	Test	F	1/1/1927	R	3/15/2007	A	Details...
2000	HUDSON	ROCK	M	4/4/1930	R	6/18/2007	A	Details...

Figure 45 – Client Results

In the above example, clients with last name beginning with the letter "H" are displayed. The user can further sort client by select the column link. This symbol ▲ next to a column heading indicates how the column is sorted. In this example, additional sort is by last name.

If the user selects a letter with no corresponding clients the following screen will display.

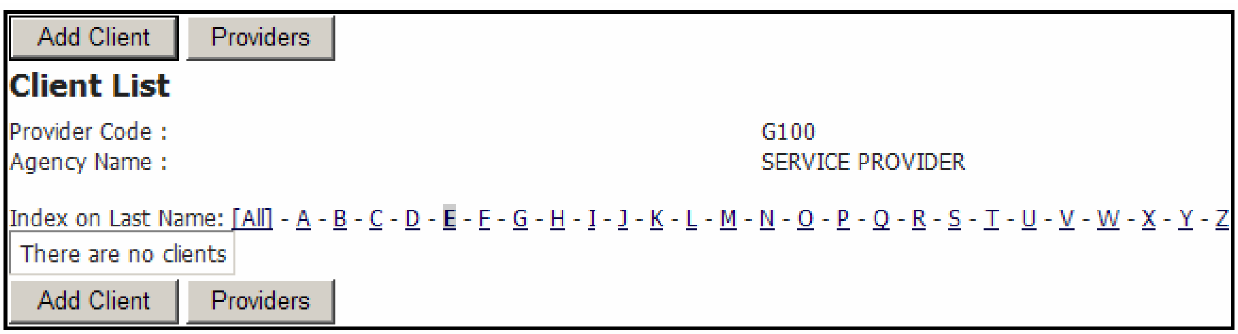
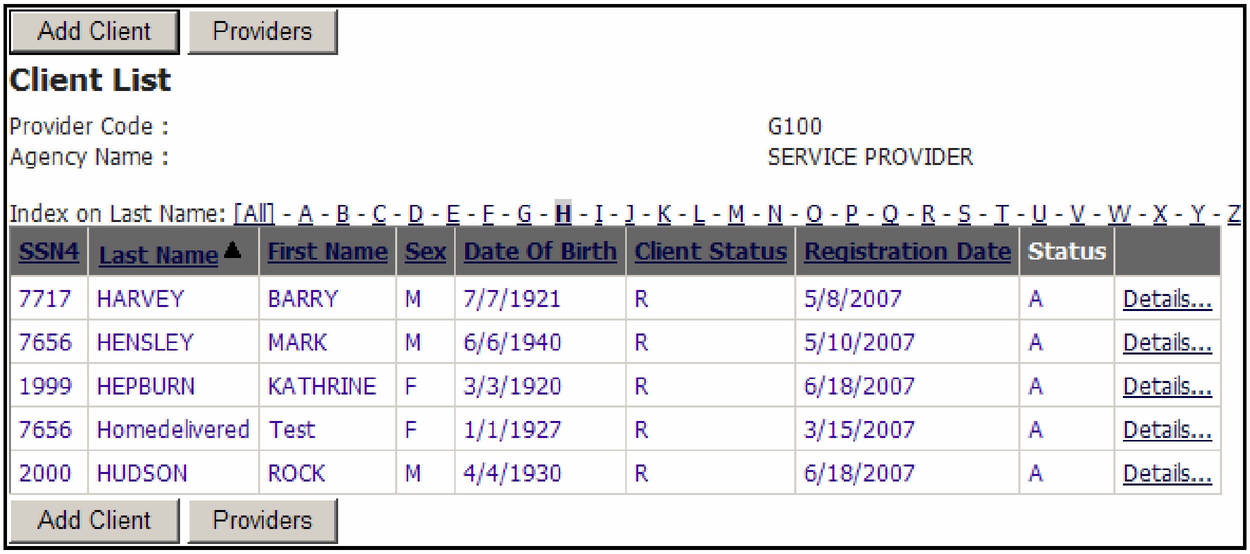


Figure 46 – Client Results with no clients

3.6.1 Add client to Provider

User can search for an existing client or add a new client.



Add Client Providers

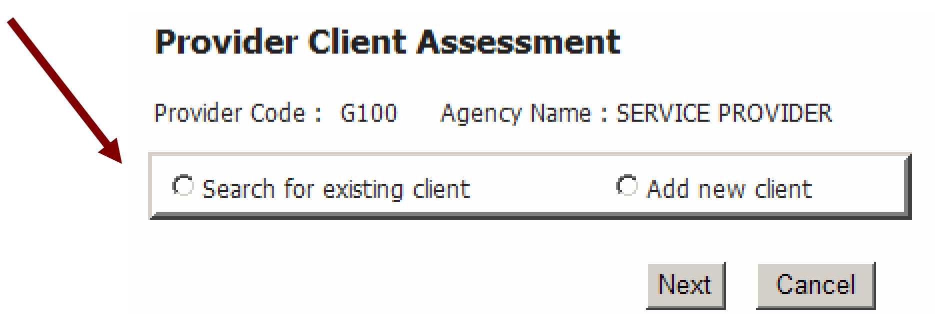
Client List

Provider Code : G100
Agency Name : SERVICE PROVIDER

Index on Last Name: [All] - A - B - C - D - E - F - G - H - I - J - K - L - M - N - O - P - Q - R - S - T - U - V - W - X - Y - Z

SSN4	Last Name ▲	First Name	Sex	Date Of Birth	Client Status	Registration Date	Status	
7717	HARVEY	BARRY	M	7/7/1921	R	5/8/2007	A	Details...
7656	HENSLEY	MARK	M	6/6/1940	R	5/10/2007	A	Details...
1999	HEPBURN	KATHRINE	F	3/3/1920	R	6/18/2007	A	Details...
7656	Homedelivered	Test	F	1/1/1927	R	3/15/2007	A	Details...
2000	HUDSON	ROCK	M	4/4/1930	R	6/18/2007	A	Details...

Add Client Providers



Search for existing client will allow user to search for a client that is already registered

In this example, the search is on the client id, click **Search** and a list of clients with that client id will display.

If the client is in the list, select the client by clicking the box to the left. Only one client at a time can be selected. Click **Next** to continue with this client or click **Cancel** to return to previous screen.

Provider Client Assessment

Provider Code : G100 Agency Name : SERVICE PROVIDER

(•) Search for existing client ( ) Add new client

Search client

Person Last4 Digits SSN : 8750

Last Name :

First Name :

Sex :

Date Of Birth : / /

Search Reset

List of Clients

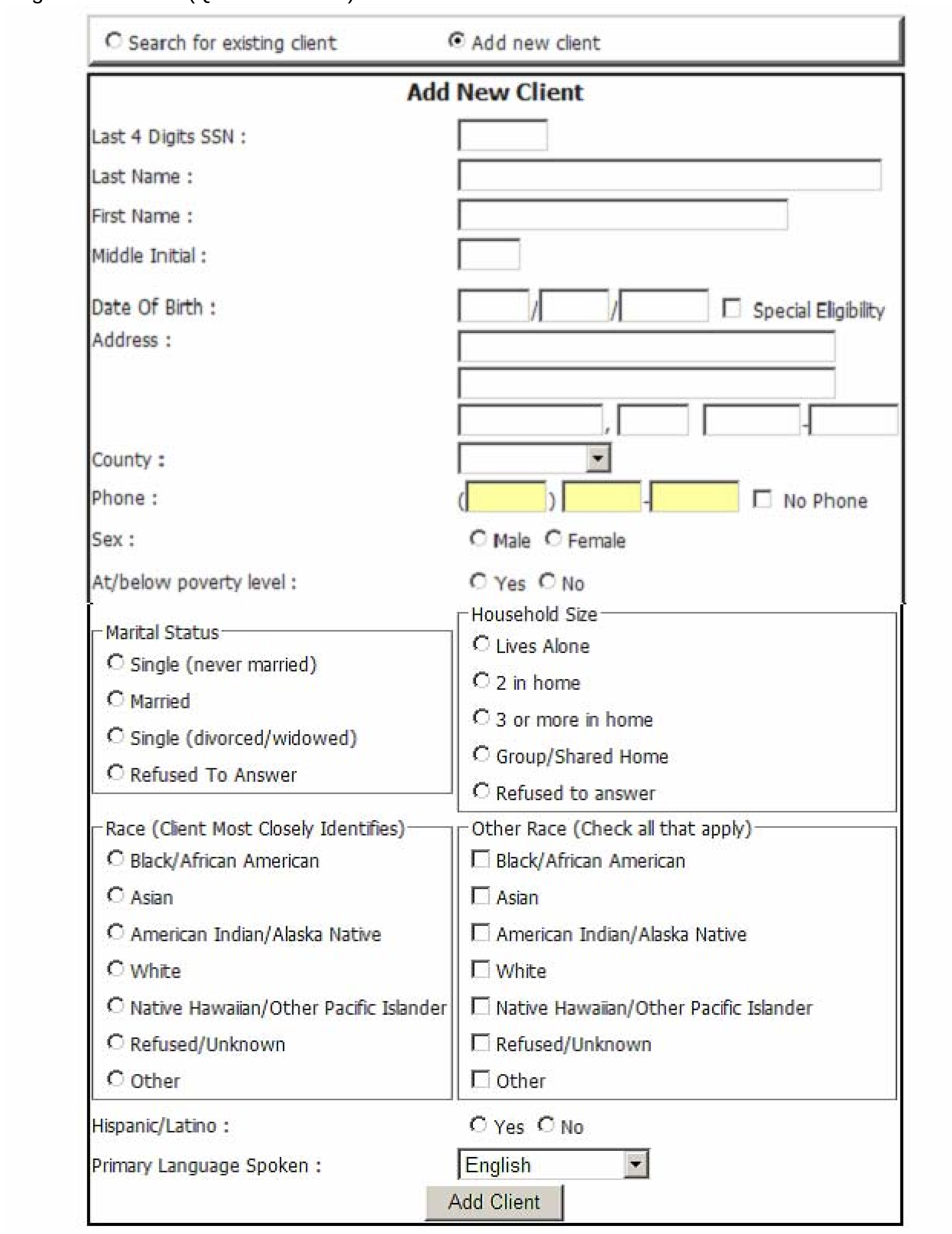
	Last Name	First Name	MI	SSN4	Sex	Date Of Birth	Status
☐	ABRAHAM	POLLY		8750	F	[illegible]	A
☐	EDWARDS	DORENE	T	8750	F	[illegible]	A
☐	LINDSEY	CLORINE		8750	F	[illegible]	A
☐	MARION	NELLIE		8750	F	[illegible]	A
☐	NORWOOD	LOIS	Y	8750	F	[illegible]	A

Next Cancel

Figure 47 – Provider Client – Search/Add

If the client is not in the list, you can search on last name, etc.

Click Add new client to display the screen to entry client information from the DAAS-101 Client Registration Form (Questions 1-13). Click Add Client.


Search for existing client
Add new client

Add New Client

Last 4 Digits SSN :
Last Name :
First Name :
Middle Initial :
Date Of Birth : / / Special Eligibility
Address :
County :
Phone : ( ) - No Phone
Sex : Male Female
At/below poverty level : Yes No

Marital Status
Single (never married)
Married
Single (divorced/widowed)
Refused To Answer

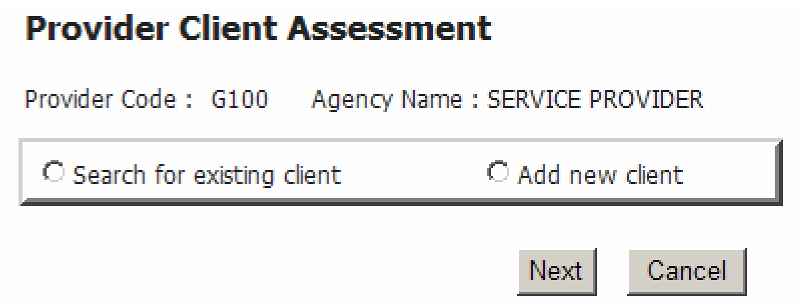
Household Size
Lives Alone
2 in home
3 or more in home
Group/Shared Home
Refused to answer

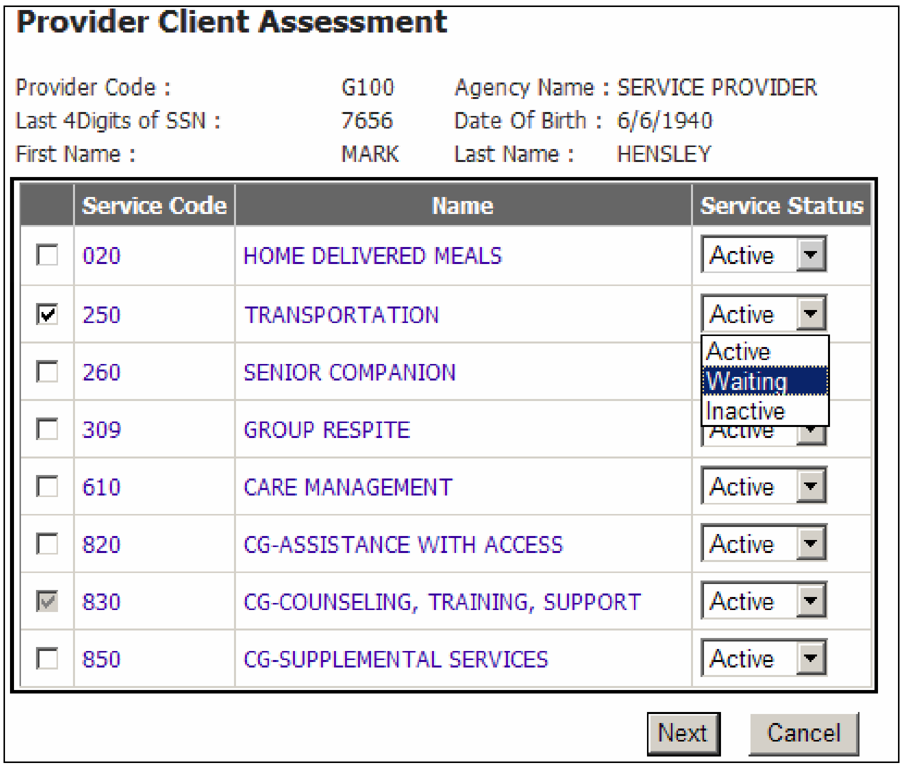
Race (Client Most Closely Identifies)
Black/African American
Asian
American Indian/Alaska Native
White
Native Hawaiian/Other Pacific Islander
Refused/Unknown
Other

Other Race (Check all that apply)
Black/African American
Asian
American Indian/Alaska Native
White
Native Hawaiian/Other Pacific Islander
Refused/Unknown
Other

Hispanic/Latino : Yes No
Primary Language Spoken : English
Add Client

Click Add Client. The following screen will display. Click Next to add Services to the client.





Check the box to the left of the services indicated on the DAAS-101 Client Registration Form Section I. Click **Next.** The next screen to display is based on what services the user selected. The following service codes will require the user to complete

Service Code(s)	DAAS-101 – Sections
020, 021, 022, 610	Sections I, II, IV, V, VI, and VII
180, 181, 182	Section I, II and VII
033, 250	Section I and VII
Respite - 210, 309 In-Home Respite 235, 235, 237, 238, Family Caregiver 820, 830, 840, 850	Sections I, VI, and VII – Caregiver information Section III, VI, and V – Care Recipient Information
All other HCCBG services	Sections I, IV, V (if appropriate), VI (if appropriate), and VII

3.6.2 Update Provider Client Details

From the Provider Client Details page, click on the **Update** button, then click the client **Details…** link. The following screen appears:

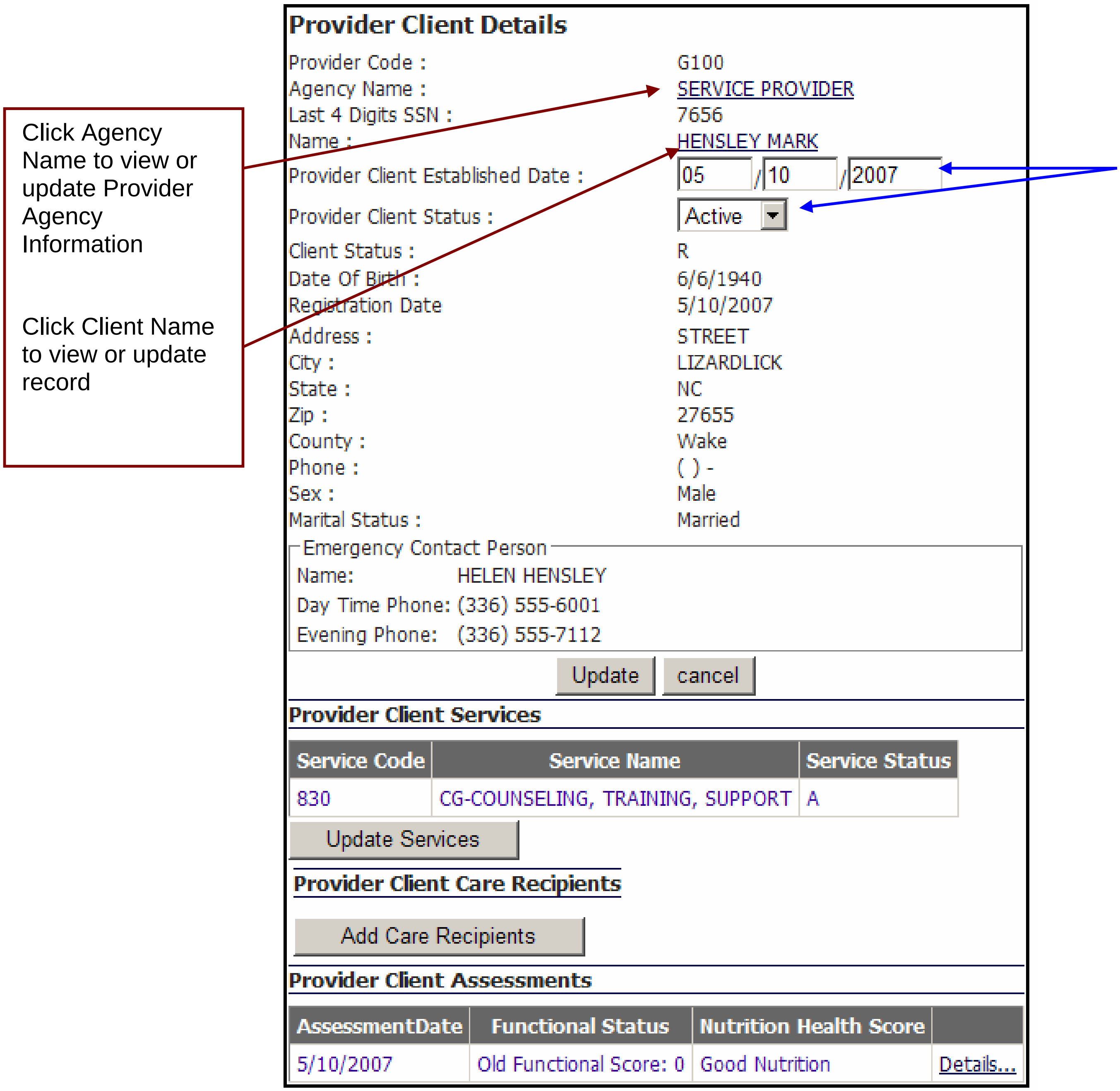


Figure 48 – Provider Client Details Screen

Provider Users may change only the **Provider Client Status** or the **Provider Client Established Date** on this screen. To submit changes, click **Update** or click **Cancel** to exit without saving and return to the previous screen. To change Client Record, click the client name link. Example: Hensley Mark

3.6.3 Update Provider Client Services

Updating Provider Client Services is a two-part process.

STEP ONE

To begin, scroll down to **Update Services:**

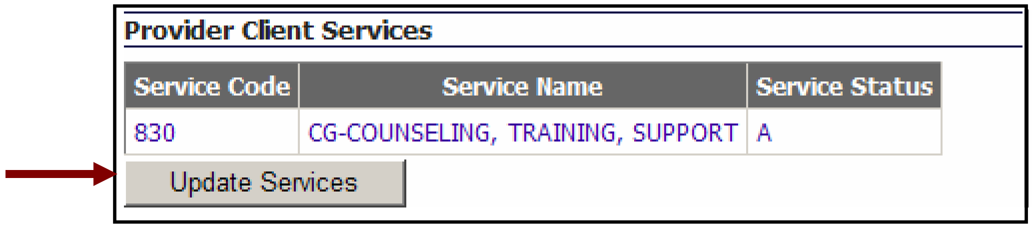


Figure 49 – Provider Client Services Screen

Click the **Update Services** button and the first screen in the process appears:

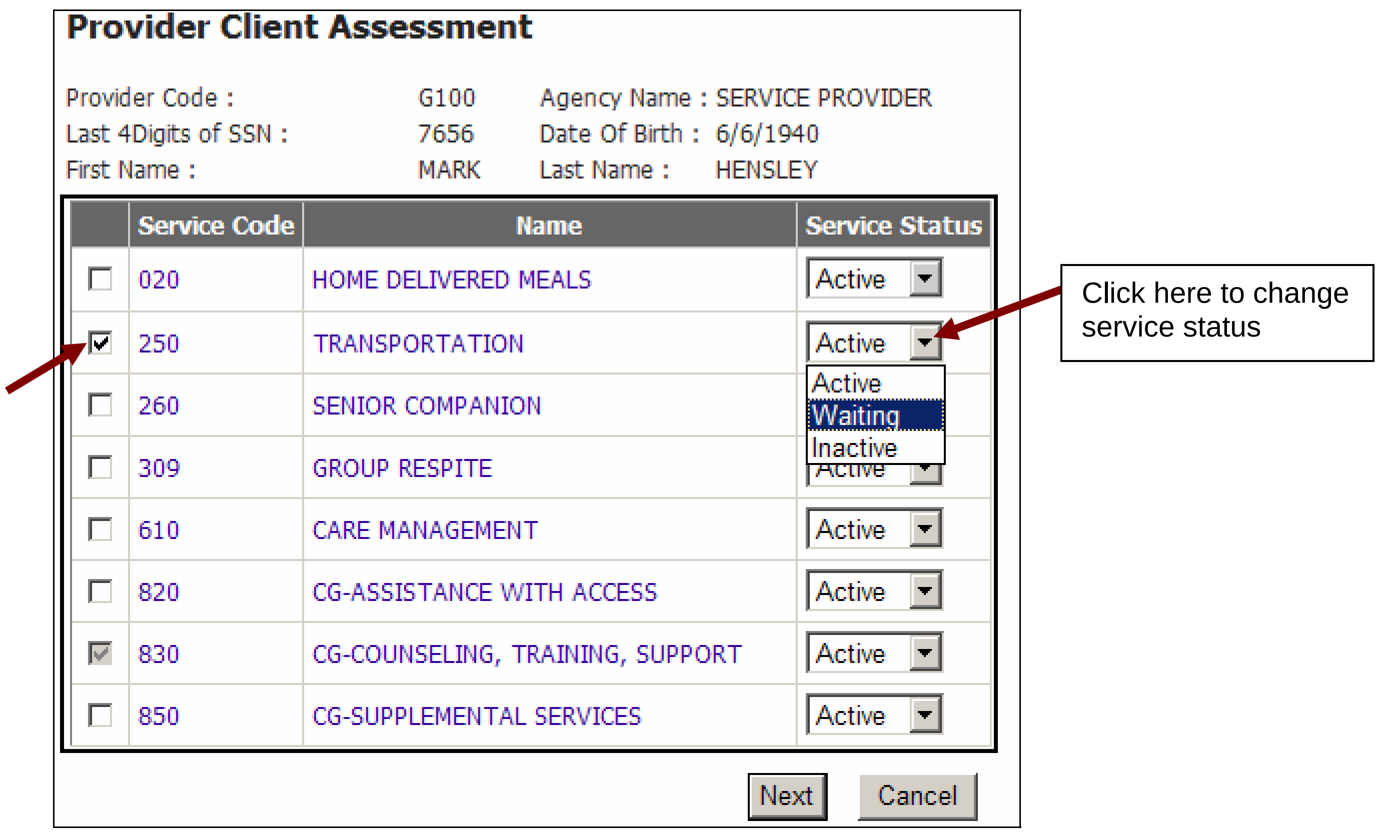


Figure 50 – Provider Client Assessment, Status Selection Screen

All services associated with this **Provider** appear. User should select the service(s) for this client by clicking the box ☑ to the left of the service. Users may change the *Service Status* ONLY to *Active*, *Waiting* or *Inactive* by clicking the arrow to the right of any drop-down box. To view the Service Status options click this symbol.

STEP TWO

When complete, click **Next**. The appropriate *Provider Client Assessment* form will appear based on service selected.

If the user selected General Transportation (250) or Medical Transportation (033) the following screen will appear for the user to select the Overall Functional Status of the Client.

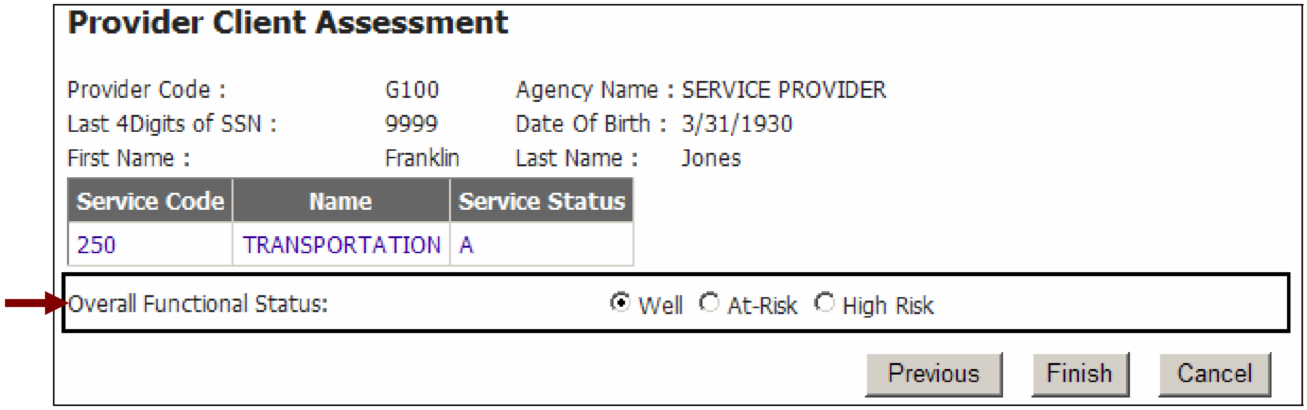


Figure 51 Client Overall Functional Status

Previous	Click **PREVIOUS** to return to the list of available services to this Client
Finish	When the Provider Client Assessment is complete, click the **FINISH** button to return to the Client Detail Screen
Cancel	Click **CANCEL** to return to Provider Client Detail

NOTE: There are several possible forms which may appear for client assessments.

Complete examples and instructions for each are included in the Appendix to this manual.

3.6.4 Add Provider Care Recipients

To add care recipients for the selected client scroll down to the part of the screen:

Figure 52 – Add Care Recipients

Click the **Add Care Recipients** button. The Add Client screen appears:

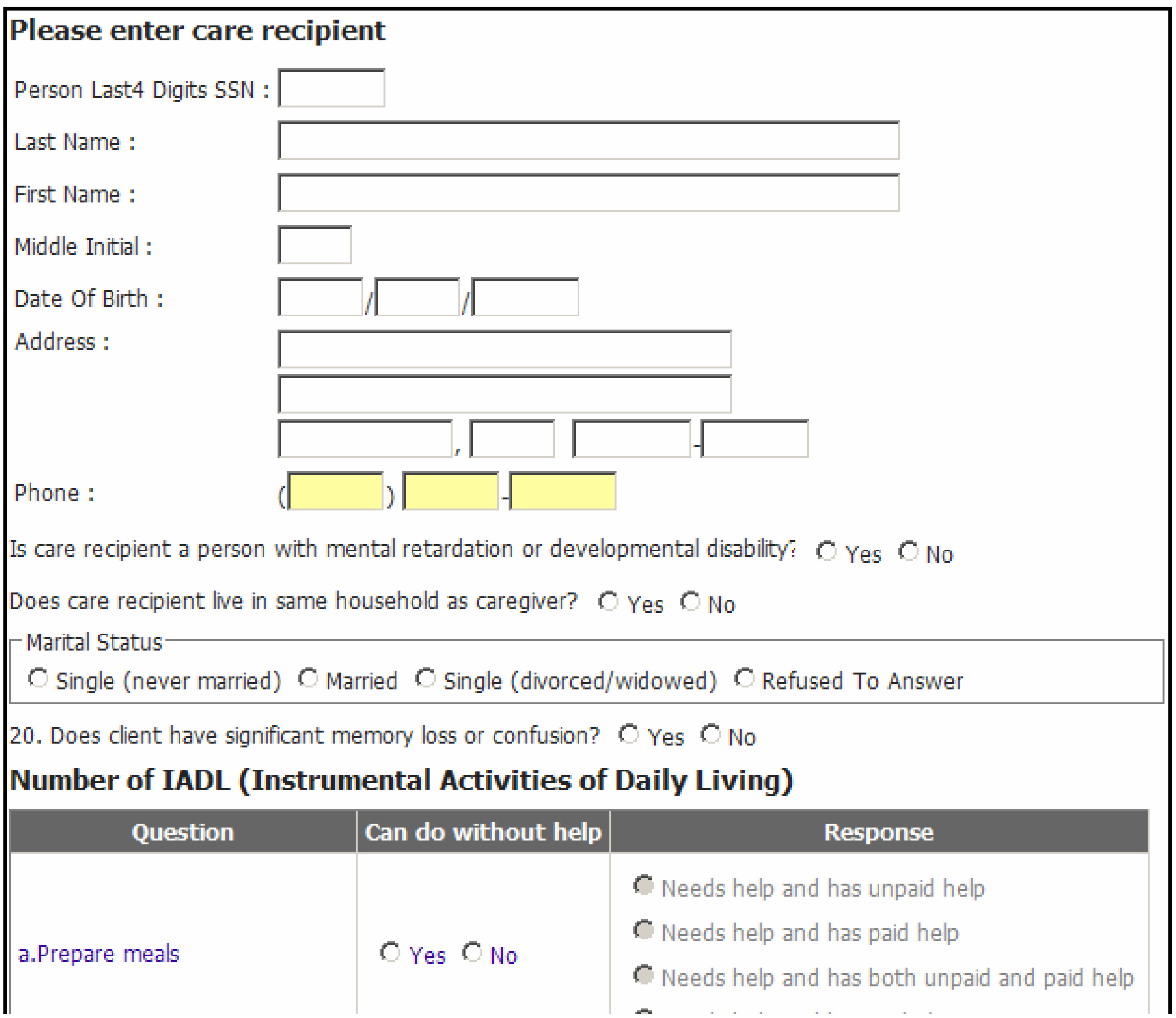


Figure 53 – Add Provider Care Client

The user should key the information from the DAAS-101 Client Registration Form. All **Care Recipient** information is required entries. When complete, click **Finish.**

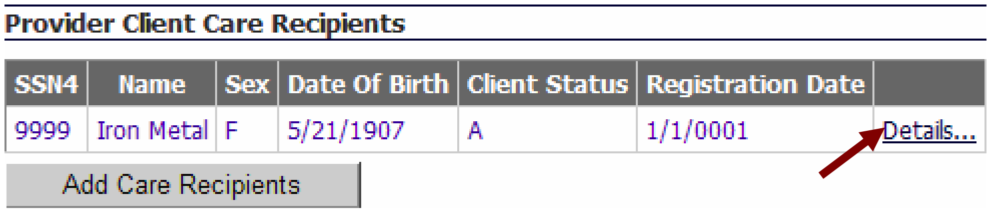


Figure 54 – Update Provider Client Care Recipient

To Update the Care Recipient the user should click the Details… link. The following screen will display for the user to update existing data from the DAAS-101 Client Registration Form Section III and Section IV.

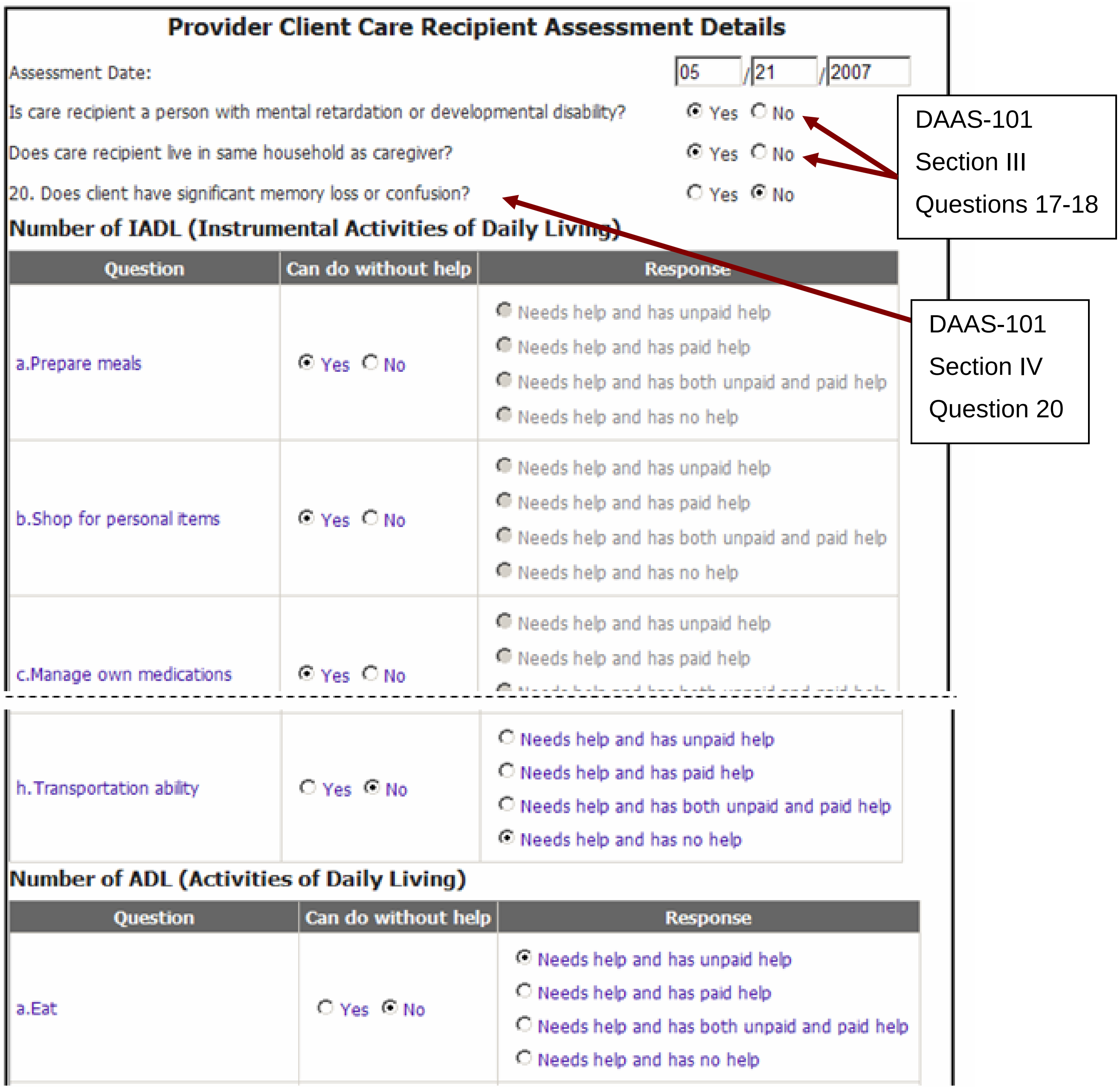


Figure 55 – Provider Client Care Recipient Assessment Details

This data is keyed from DAAS-101 Client Registration Form Section IV, V and VI.

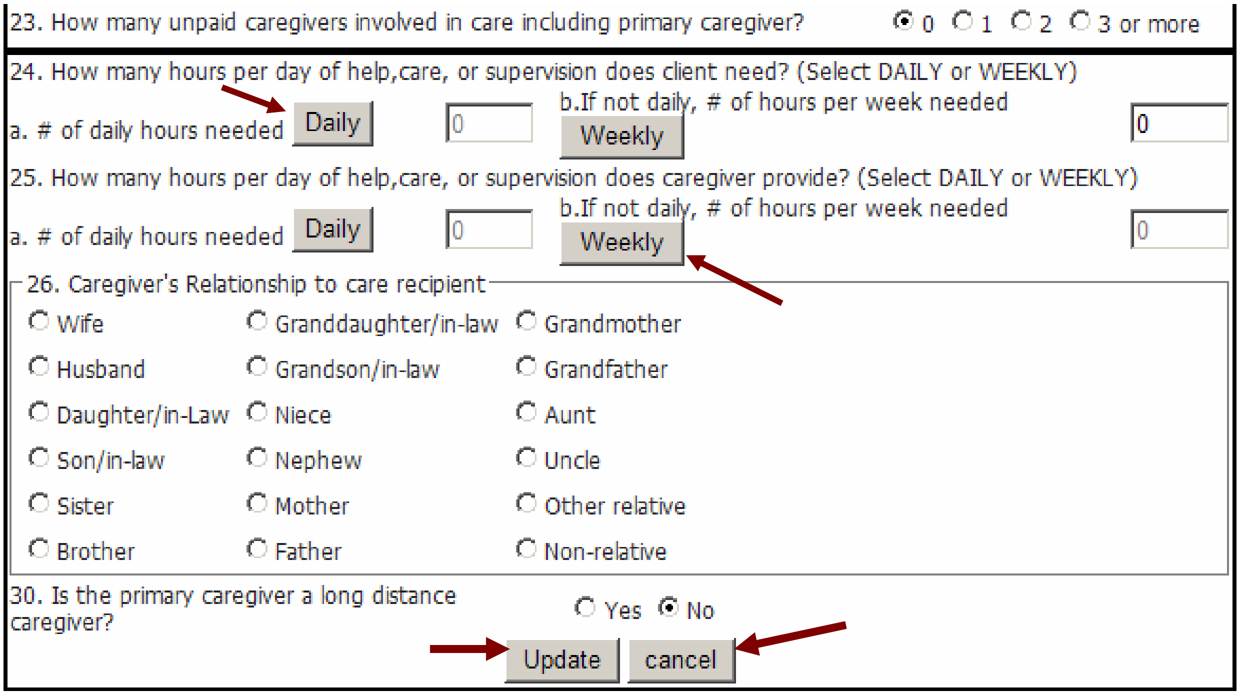


Figure 56 - Provider Client Care Recipient Questions

Items 24 and 25 allow the user to click **Daily** or **Weekly**. Only one entry can be made, either **Daily** or **Weekly**. Selecting **Daily** will disable **Weekly** as will selecting **Weekly** will disable **Daily**.

Click **Update** to save changes or click **Cancel** to discard and return to the previous screen.

The user can change the Assessment Date and make other changes to the Assessment Details. Changing the date will create another Assessment Record for the client.

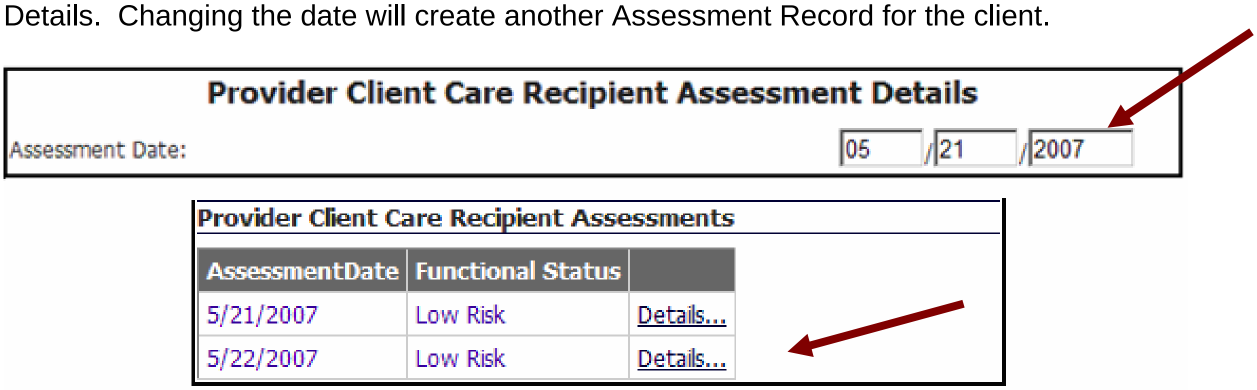


Figure 57 Assessment Date

Clicking Details… will only allow user to update Care Recipient Established Date and Status.

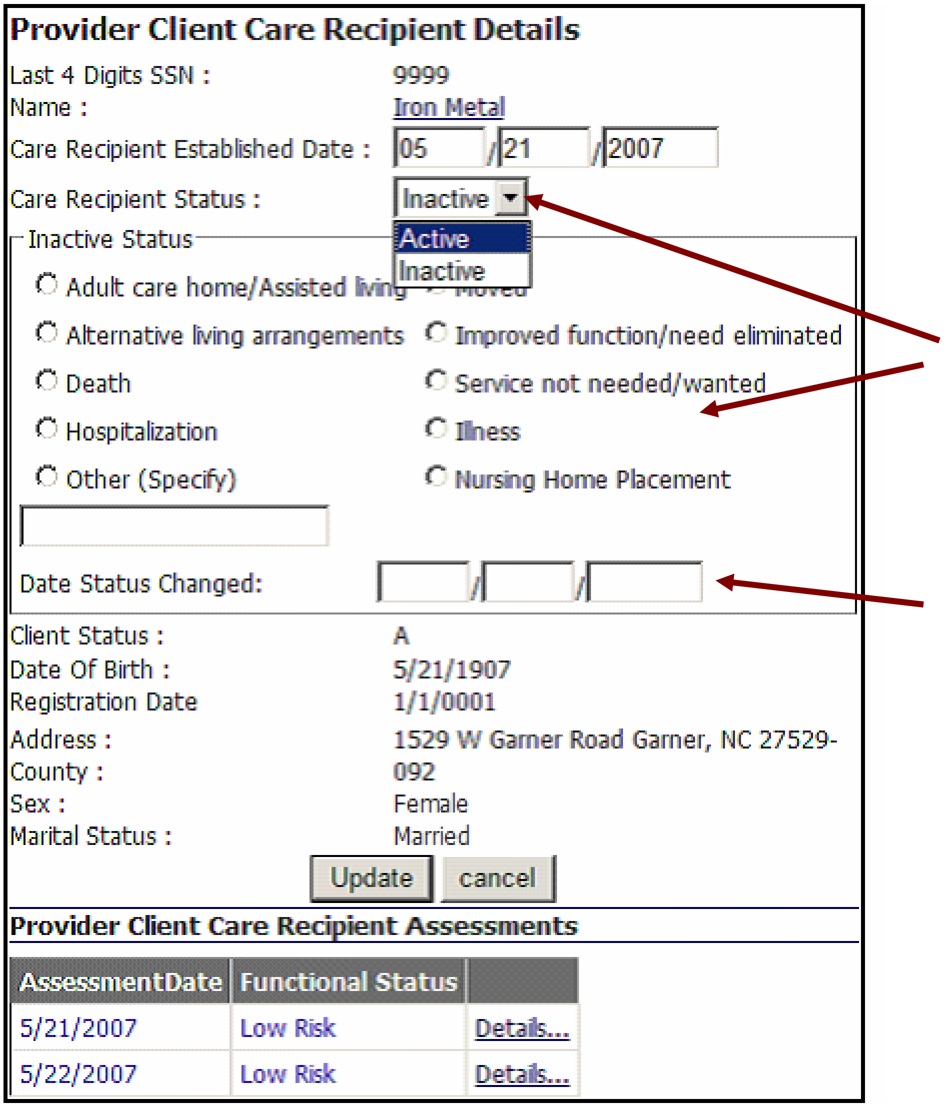


Figure 58 – Provider Client Care Recipient Inactive Status

When **Inactive** is selected the user is prompted to add the reason **Inactive** was chosen. In this example, the Inactive Status applies to the Care Recipient. The user should key the information recorded on the DAAS-101 Client Registration Form, Section I, Item 1.

The **Date Status Changed** is the date recorded on the DAAS-101 Client Registration Form.

Click **Update** to save changes or click **Cancel** to discard and return to the previous screen.

3.3.2.1 Search for an existing Client

Click **Search Client** on the menu bar to find a specific client for viewing or updating.

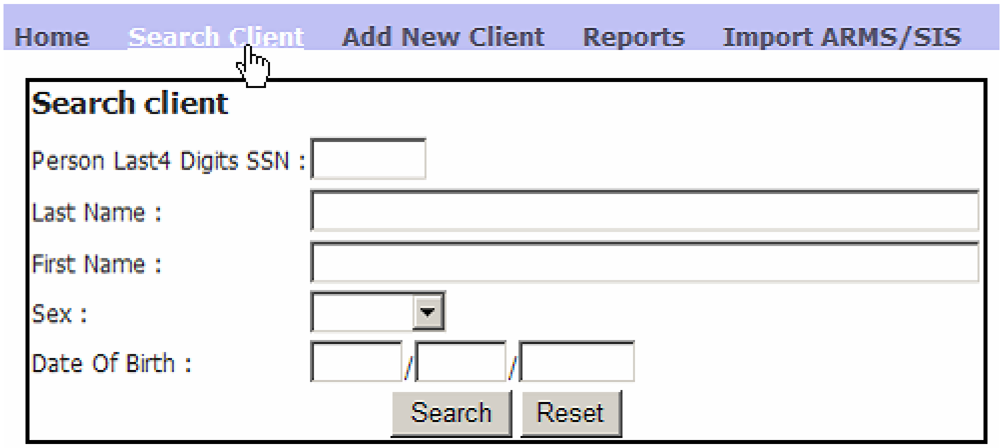


Figure 59 – Client Search (adding Care Recipients)

Enter search criteria in at least one of the fields above. The more information typed, the fewer the search results will display. For example, typing only "Smith" in the Last Name box will yield many results, but adding the **Last4** (of the SSN) or **Date of Birth** will narrow the results significantly.

> **NOTE**: A search using the **Date of Birth** must also include at least one other criterion – Person Last4 Digits SSN, Last Name or First Name

> **NOTE**: Entering too much information in the fields may result in NOT finding the desired client. If a match is not found for a client that is known to exists the cause is may be a misspelling or typing mistake, verify information and try again.

For example, entering **8750** in the **Last4 Digits** (of SSN) field, then clicking **Next**, results in the following search results display:

List of Clients

Last Name	First Name	MI	SSN4	Sex	Date Of Birth	Status	Registration Date	
ABRAHAM	POLLY		8750	M	[illegible]	A	11/4/2005	Details...
EDWARDS	DANIEL	T	8750	F	[illegible]	A	9/1/2004	Details...
LINDSEY	DELL		8750	F	[illegible]	A	8/13/1997	Details...
MARION	SALLY		8750	M	[illegible]	A	6/3/2002	Details...
NORWOOD	WALLY	Y	8750	M	[illegible]	A	7/28/2005	Details...

Figure 60 – Select a Client from Search Results

Click the **Details…** link to the right to open the client information:

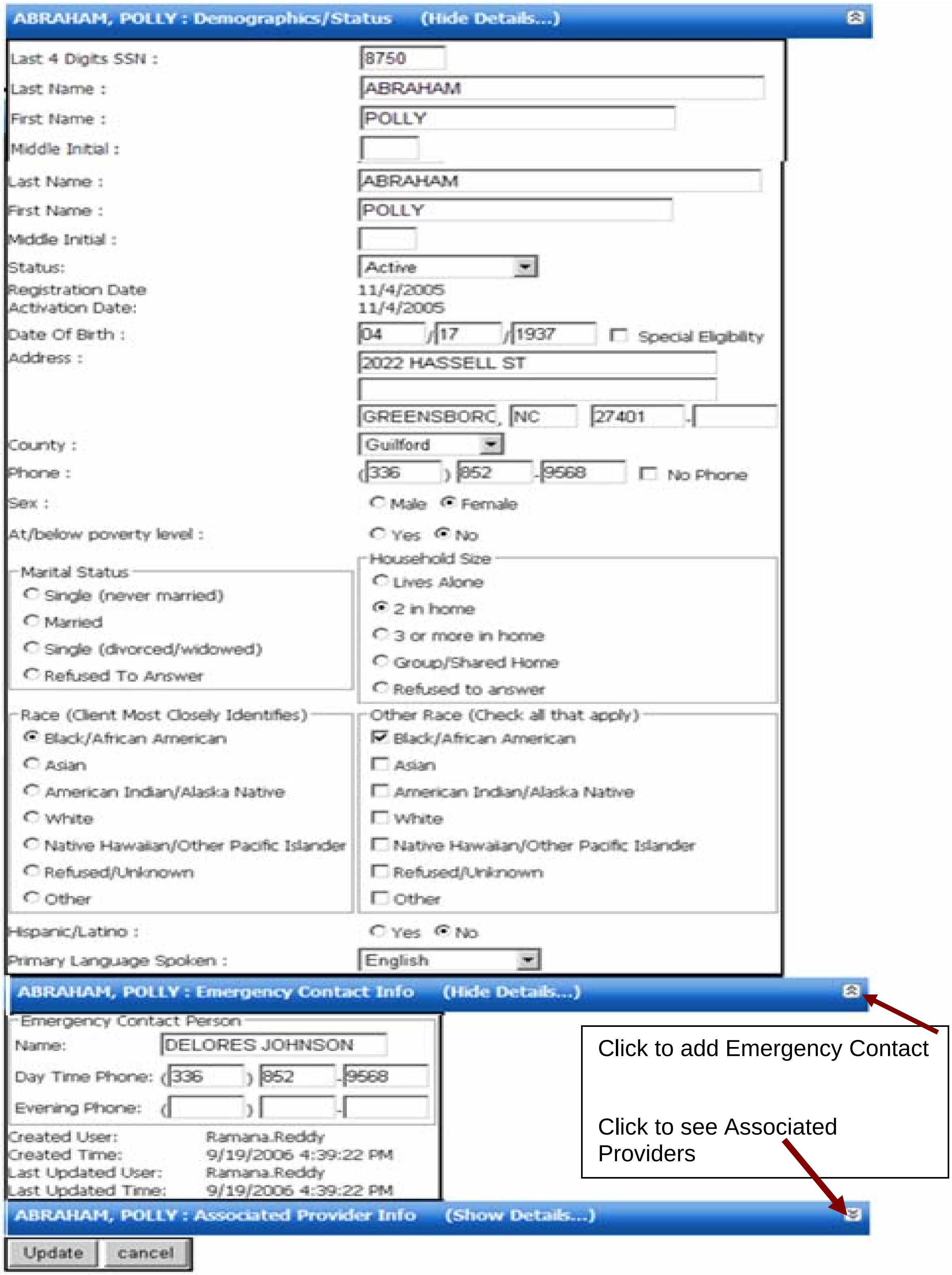


Figure 61 – Client Details

This form is divided into three sections:

- Demographics / Status (DAAS-101 Client Registration Form – Questions 1-14)
- Emergency Contact Info (DAAS-101- Client Registration Form - Section VII)
- Associated Provider Info providing serving this client

Figure 62 – Associated Provider Information for Client

For additional client information, click any where on the blue bar to **Show Details**. Click on the blue bar to **Hide Details**

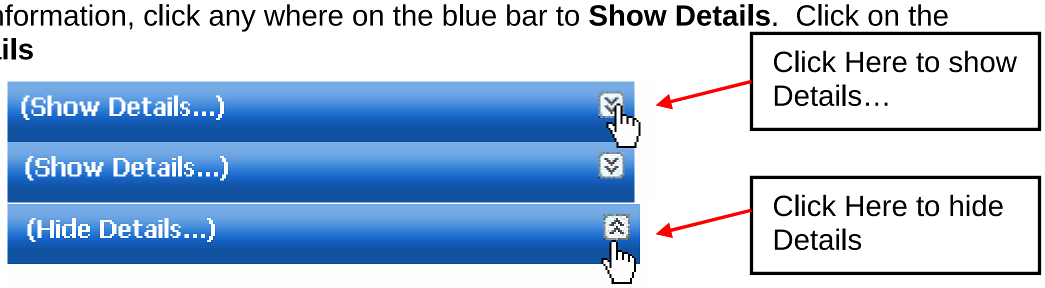


Figure 63 -- Using the Scroll Button

When the form is complete, click **Update** to save the information and return to the previous screen, or **Cancel** to return without saving.

NOTE: If an error message is received the most likely cause is failing to fill in all the required fields. The user will be prompted in red of the error message. Please review the form and try again.

3.6.5 Provider Care/Client Assessments

Provider Client Assessments

AssessmentDate	Functional Status	Nutrition Health Score	
5/22/2007	Well	Good Nutrition	Details...

Figure 64 – Provider Client Assessment Selection Screen

Choose one of the assessment types by clicking on the appropriate **Details…** link. The assessment form will appear next. To add a new assessment, change the date and update as needed. Click **Update** to Save new assessment or click **Cancel** to exit the form without saving.

Provider Client Assessment Details

Assessment Date: 07 / 01 / 2007

Nutrition health score

Question	Response	Refused to answer
a.Do you have an illness or condition that made you change the kind and/or amount of food you eat?	Yes No	
b.How many meals do you eat per day?		
c.How many fruits per day?		
d.How many vegetables per day?		
e.How many milk/dairy products per day?		

Figure 65 – Sample Client Assessment Form Details

NOTE: There are a number of assessment forms in ARMS. The figure above shows the top part of a typical example. All forms and instructions for using them are included in the Appendix to this manual.

3.7 Add a New Client

To add a new client to ARMS, click **Add New Client** on the menu bar.

Home Search Client Add New Client Reports Import ARMS/SIS

The Client Data Entry Screen will display for users to key data from DAAS-101. Click the **Create** button to add the client. If any required field is left blank—or invalid characters are used—the system will show **warning messages in red text** where the errors occurred. Simply correct the errors and click Create again to complete this process. Click Cancel to exit the form without saving.

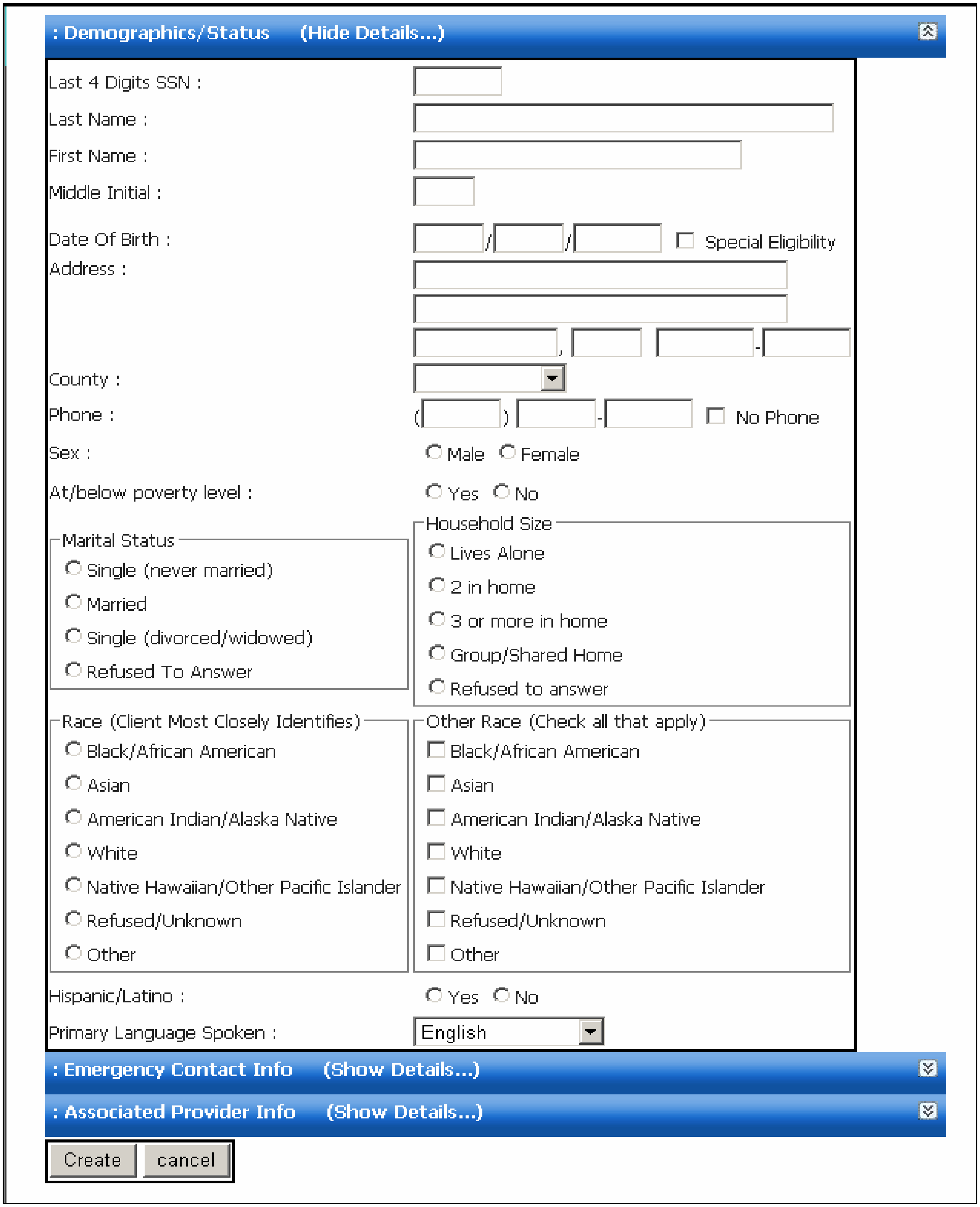
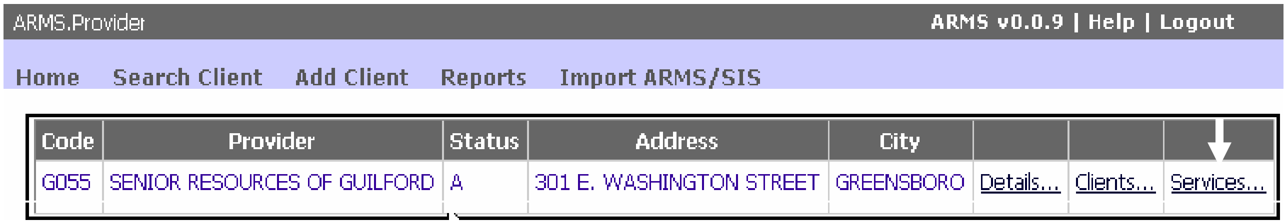


Figure 66 – Add New Client

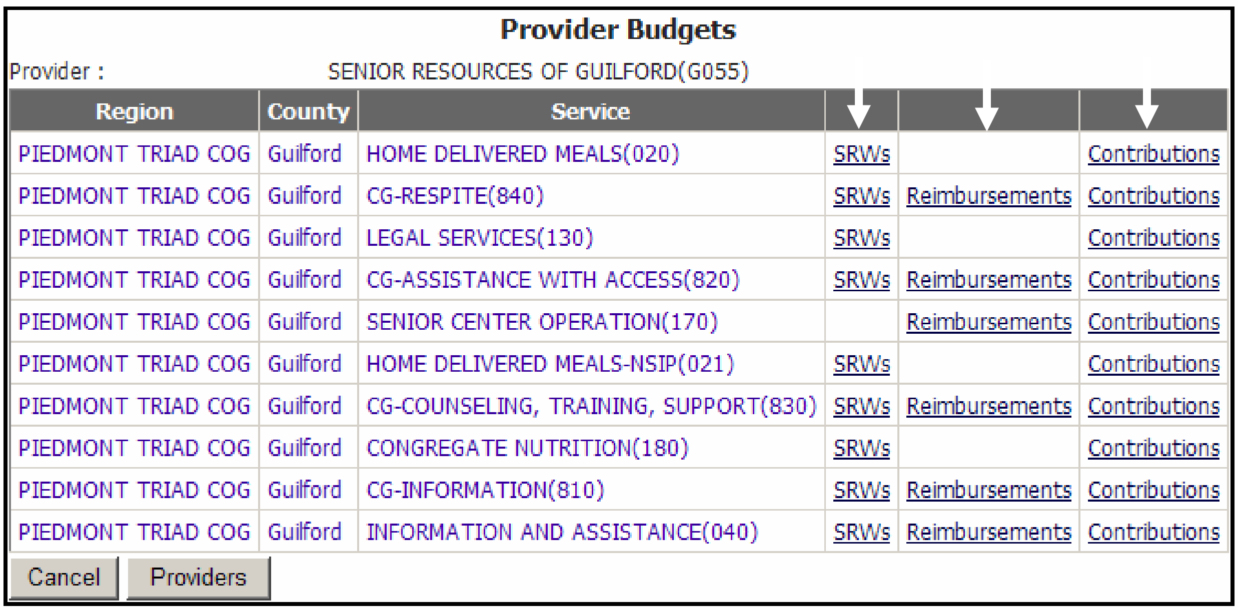
3.7.1 Provider Services

To view the services associated with any provider, click the **Services…** link:



Code	Provider	Status	Address	City			
G055	SENIOR RESOURCES OF GUILFORD	A	301 E. WASHINGTON STREET	GREENSBORO	Details…	Clients…	Services…

The budgets associated with this provider are displayed. The three left columns show the SRW, Reimbursement, and Consumer Contributions/Program Income details associated with these line items.



Provider Budgets

Provider : SENIOR RESOURCES OF GUILFORD(G055)

Region	County	Service			
PIEDMONT TRIAD COG	Guilford	HOME DELIVERED MEALS(020)	SRWs		Contributions
PIEDMONT TRIAD COG	Guilford	CG-RESPITE(840)	SRWs	Reimbursements	Contributions
PIEDMONT TRIAD COG	Guilford	LEGAL SERVICES(130)	SRWs		Contributions
PIEDMONT TRIAD COG	Guilford	CG-ASSISTANCE WITH ACCESS(820)	SRWs	Reimbursements	Contributions
PIEDMONT TRIAD COG	Guilford	SENIOR CENTER OPERATION(170)		Reimbursements	Contributions
PIEDMONT TRIAD COG	Guilford	HOME DELIVERED MEALS-NSIP(021)	SRWs		Contributions
PIEDMONT TRIAD COG	Guilford	CG-COUNSELING, TRAINING, SUPPORT(830)	SRWs	Reimbursements	Contributions
PIEDMONT TRIAD COG	Guilford	CONGREGATE NUTRITION(180)	SRWs		Contributions
PIEDMONT TRIAD COG	Guilford	CG-INFORMATION(810)	SRWs	Reimbursements	Contributions
PIEDMONT TRIAD COG	Guilford	INFORMATION AND ASSISTANCE(040)	SRWs	Reimbursements	Contributions

Cancel Providers

Figure 67 – Provider Services List

SRWs	Site/Route/Worker Code is to gather information concerning the points of service delivery for all service providers. The information provides for the sorting and grouping of clients for a like service.
Reimbursements	Report on a monthly basis, line item expenditures for services which are non-unit based.
Contributions	Report consumer contributions/program income collected by service for the month being reported

3.7.2 View / Edit Provider Budget SRWs

Click on the **SRWs** link to view Site/Route/Workers details. All the Site/Route/Workers associated with this Provider will appear.

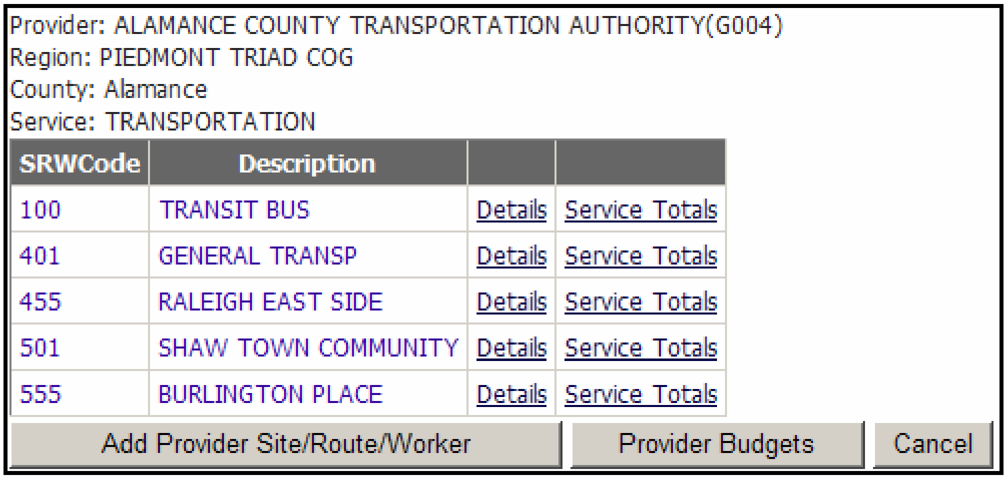


Figure 68 – Site/Route/Workers Details

Click on **Provider Budgets** OR **Cancel** to return to the previous screen.

Click on the **Add Provider Site/Route/Worker** button to add a new SRW.

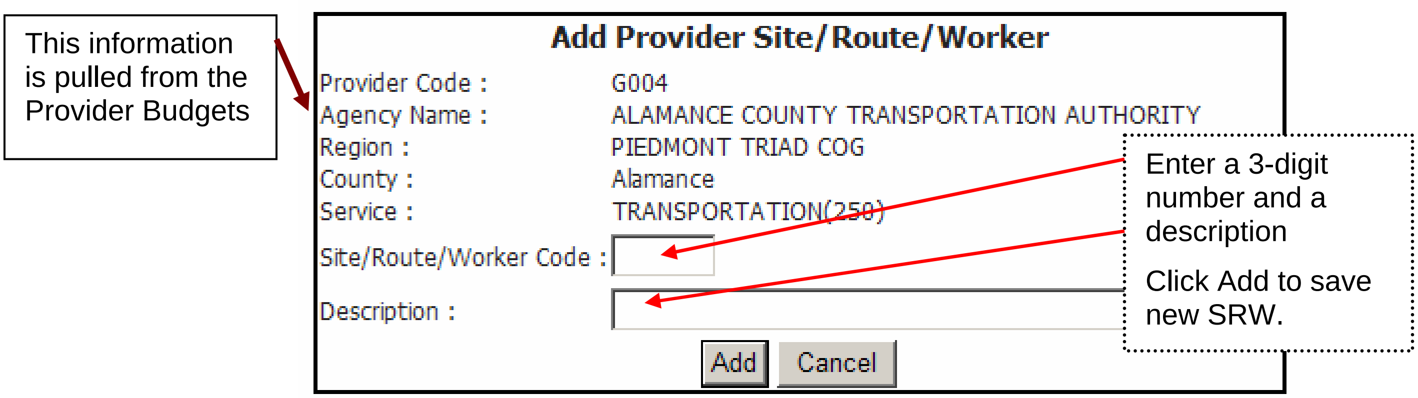


Figure 69 – Add Site/Route/Worker

Users may add the information in the two editable fields and click **Add** to save or **Cancel** to return to the previous screen.

The Site/Route/Worker Code field cannot be left blank. If the exact same Site/Route/Worker Code already exists for the service and county, an error message will display.

Click on **Details** to make changes to the Provider Site/Route/Worker Information.

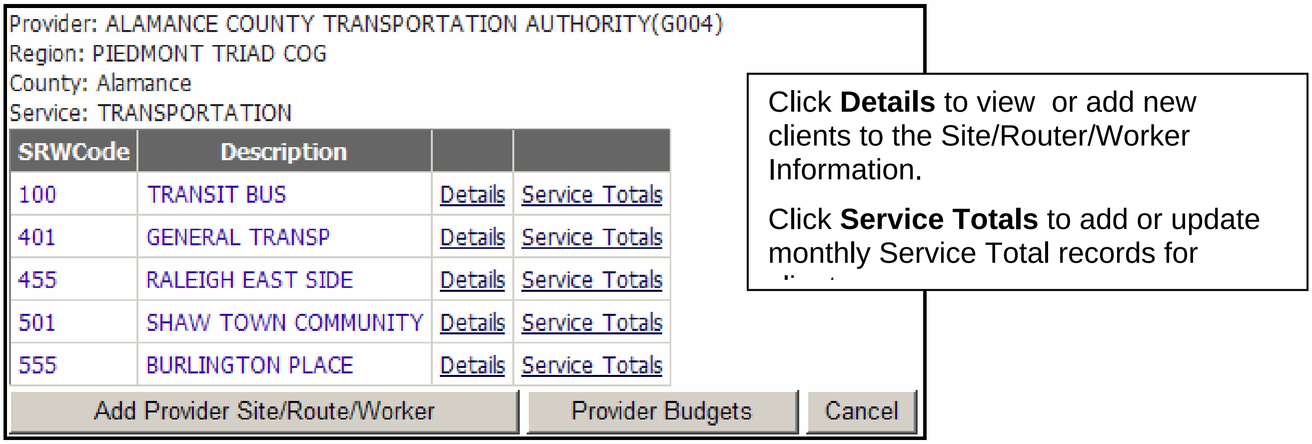


Figure 70 - Site/Route/Worker Information

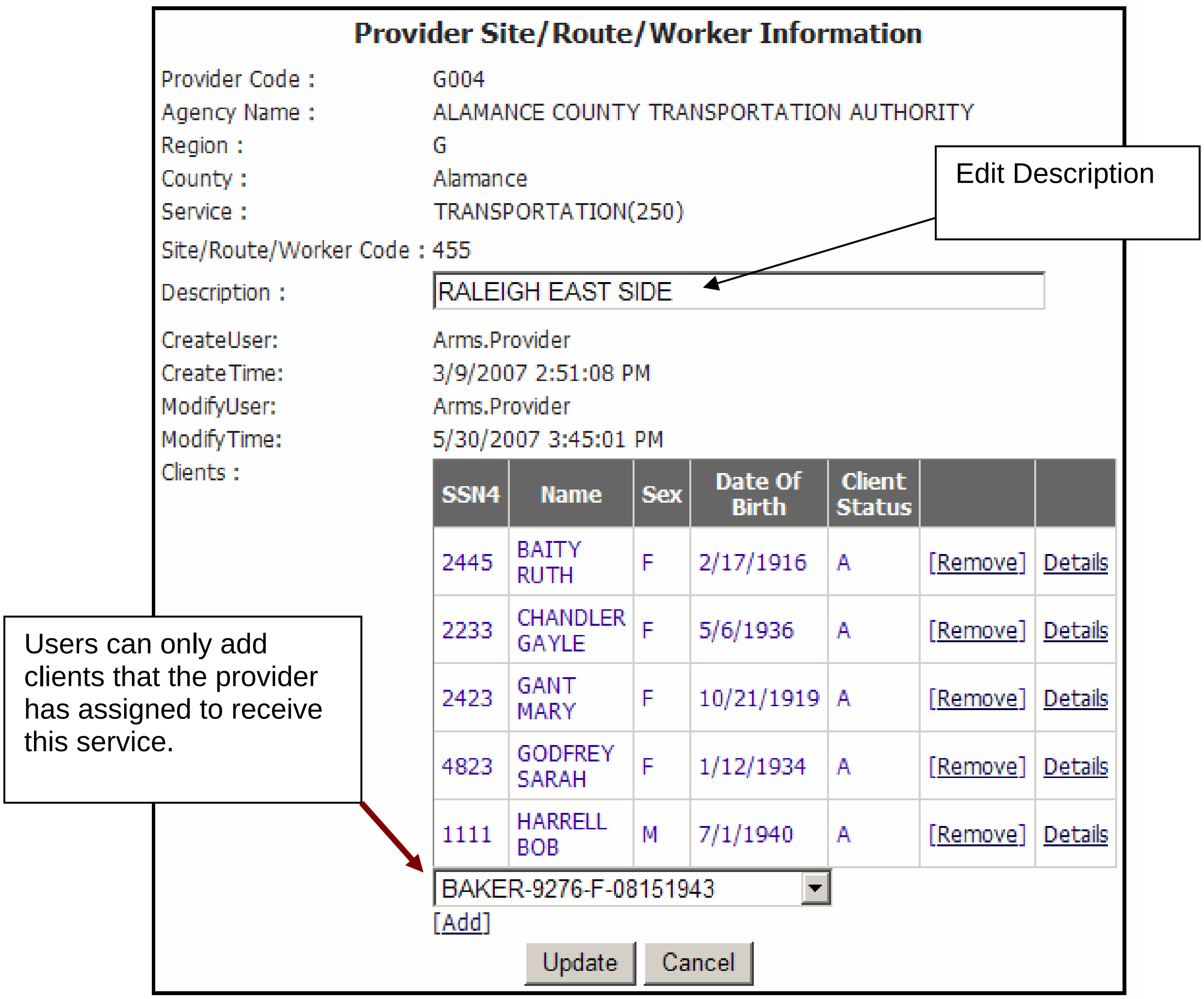


Figure 71 – S/R/W Additional Details

The **Remove** feature will only allow the user to remove a client from the SRW that do not have any units on the service total record.

To view Service Totals for a client, click **Details.** The service total record displays for the client.

Provider Site/Route/Worker Service Totals

Provider: FRIENDSHIP ADULT DAY SERVICES(G002) Region - County : G - Alamance
Service : ADULT DAY CARE(030) [Maximum monthly units: 0] Site/Route/Worker : 100 - ADULT DAY CARE

SSN4	Name	Status	Date Of Birth	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Total
1111	BEAM JOHN	A	12/23/1933	20	23											43
				20	23	0	0	0	0	0	0	0	0	0	0	43

Verify | Update | Provider Budgets | Cancel

Figure 72—Service Details (from Site/Route/Worker)

Enter the total monthly units by month. Users may modify the figures in any month. Click one of the four buttons…

- **Verify** - Recalculate the Totals.
- **Update - S**ave the changes and return to previous screen
- **Provider** Budgets to return to the Provider Budgets screen without saving
- **Cancel** to return to the previous screen without saving

The user can click on **Service Totals** to go directly to the Service Totals Report screen.

Provider: ALAMANCE COUNTY TRANSPORTATION AUTHORITY(G004)
Region: PIEDMONT TRIAD COG
County: Alamance
Service: TRANSPORTATION

SRWCode	Description		
100	TRANSIT BUS	Details	Service Totals
401	GENERAL TRANSP	Details	Service Totals
455	RALEIGH EAST SIDE	Details	Service Totals
501	SHAW TOWN COMMUNITY	Details	Service Totals
555	BURLINGTON PLACE	Details	Service Totals

Add Provider Site/Route/Worker | Provider Budgets | Cancel

In this example, the client status = D and is highlighted in red to indicate the client is death. This system will not allow additional units to be added for the month after the death date has been saved in ARMS. When keying units, the cursor will skip clients that have a status of D or I (Inactive).

Provider Site/Route/Worker Service Totals

Provider: ALAMANCE COUNTY TRANSPORTATION AUTHORITY(G004) Region - County : G - Alamance
Service : TRANSPORTATION(250) [Maximum monthly units: 250] Site/Route/Worker : 455 - RALEIGH EAST SIDE

SSN4	Name	Status	Date Of Birth	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Total
2445	BAITY RUTH	D	2/17/1916													0
2233	CHANDLER GAYLE	A	5/6/1936													0
2423	GANT MARY	A	10/21/1919													0
4823	GODFREY SARAH	A	1/12/1934													0
1111	HARRELL BOB	R	7/1/1940													0
				0	0	0	0	0	0	0	0	0	0	0	0	0

A = Active Client – client record updated in the new ARMS system

D = Death

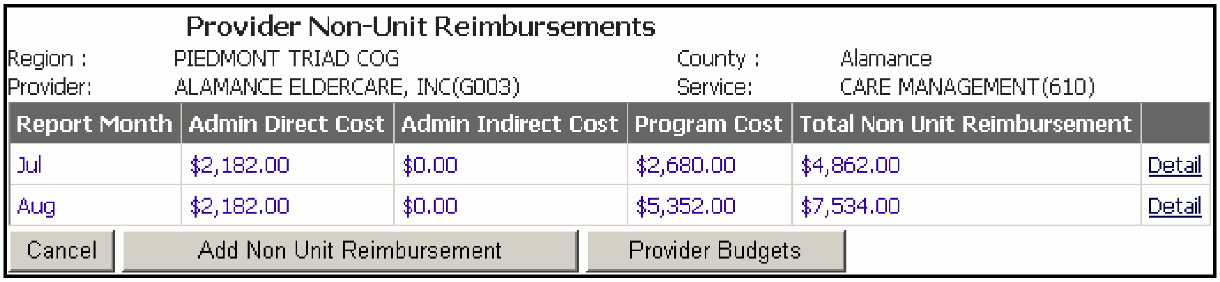
R = Clients that migrated and record not updated in the new ARMS system.

Verify | Update | Provider Budgets | Cancel

Figure 73 - Service Totals Data Entry Screen

View / Edit Provider Budget Reimbursements

Click the **Reimbursements** link to view the following:



Provider Non-Unit Reimbursements

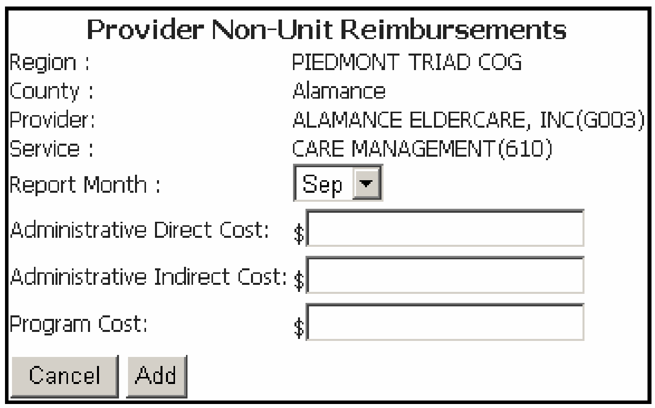
Region :	PIEDMONT TRIAD COG	County :	Alamance
Provider:	ALAMANCE ELDERCARE, INC(G003)	Service:	CARE MANAGEMENT(610)

Report Month	Admin Direct Cost	Admin Indirect Cost	Program Cost	Total Non Unit Reimbursement	
Jul	$2,182.00	$0.00	$2,680.00	$4,862.00	Detail
Aug	$2,182.00	$0.00	$5,352.00	$7,534.00	Detail

Cancel | Add Non Unit Reimbursement | Provider Budgets

Figure 74 – View / Edit Provider Budget Reimbursements

Click **Add Non Unit Reimbursement** to view this screen:



Provider Non-Unit Reimbursements

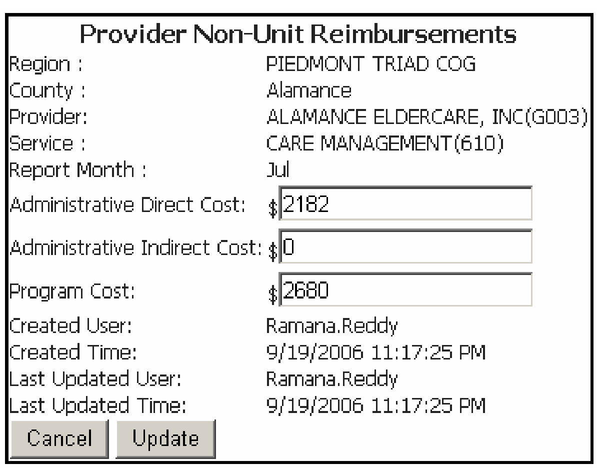
Region :	PIEDMONT TRIAD COG
County :	Alamance
Provider:	ALAMANCE ELDERCARE, INC(G003)
Service :	CARE MANAGEMENT(610)
Report Month :	Sep
Administrative Direct Cost:	$
Administrative Indirect Cost:	$
Program Cost:	$

Cancel | Add

Figure 75 – Add Non-Unity Reimbursement

Choose the correct month from the drop-down and complete the empty fields. Click **Add** to save the information or **Cancel** to exit without saving.

To view the existing non-unit reimbursement information for any month, click the appropriate **Detail** link:



Provider Non-Unit Reimbursements

Region :	PIEDMONT TRIAD COG
County :	Alamance
Provider:	ALAMANCE ELDERCARE, INC(G003)
Service :	CARE MANAGEMENT(610)
Report Month :	Jul
Administrative Direct Cost:	$2182
Administrative Indirect Cost:	$0
Program Cost:	$2680
Created User:	Ramana.Reddy
Created Time:	9/19/2006 11:17:25 PM
Last Updated User:	Ramana.Reddy
Last Updated Time:	9/19/2006 11:17:25 PM

Cancel | Update

Figure 76 -- View / Modify Non Detail

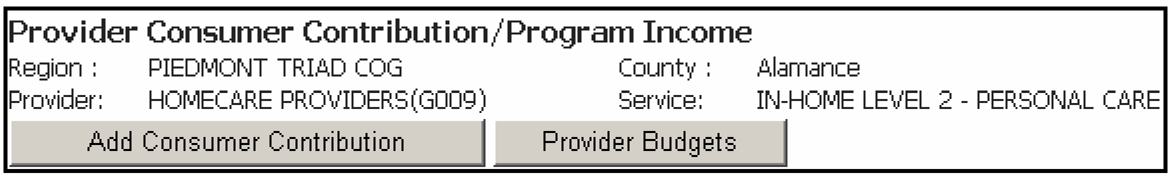
Enter figures *ONLY* into the “Administrative Direct Cost” and “Administrative Direct Cost” fields. The number in “Program Cost” field is the *total* of the two, and is calculated by the system.

> **NOTE**: Only whole numbers can be entered in the monetary fields. Entering a decimal will result in an error message.

When complete, click **Update** to save or click **Cancel** to return to the previous screen.

3.7.3 View / Edit Provider Budget Contributions

From the budget list, click **Contributions** to view the following information:


Provider Consumer Contribution/Program Income

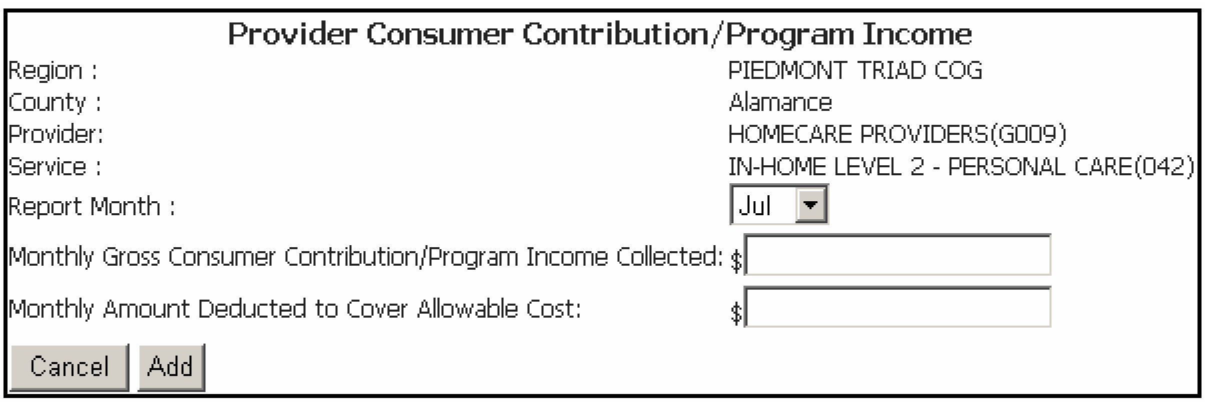
Region : PIEDMONT TRIAD COG County : Alamance

Provider: HOMECARE PROVIDERS(G009) Service: IN-HOME LEVEL 2 - PERSONAL CARE

Add Consumer Contribution | Provider Budgets

Figure 77 – Provider Cost Sharing Contributions / Program Income

Click the **Add Consumer Contribution** button to view:


Provider Consumer Contribution/Program Income

Region : PIEDMONT TRIAD COG

County : Alamance

Provider: HOMECARE PROVIDERS(G009)

Service : IN-HOME LEVEL 2 - PERSONAL CARE(042)

Report Month : Jul

Monthly Gross Consumer Contribution/Program Income Collected: $

Monthly Amount Deducted to Cover Allowable Cost: $

Cancel | Add

Figure 78 – Add Provider Contribution Item / Program Income

Make any required changes, then click **Add** to save or **Cancel** to return to the previous screen without saving.

Click **Provider Budgets** to return to the budget list.

4 Reports

Many reports are available for Provider users. To see the list, click **Reports** on the navigation bar. The list appears:

Reimbursement Reports

Demographic Reports

Verification Reports

Client/Waiting Lists

Other Reports

Figure 79 – Provider Reports Categories

Click on any of the named categories to view all the reports in that heading. For example, click on **Reimbursement Reports** to view list of available reimbursement reports.:

Reimbursement Reports

Name	Description
ZGA370	Provider Reimbursement
ZGA370-A	Provider Summary
ZGA370-A-YTD	Year-to-Date Provider Summary
ZGA370-YTD	Year-to-Date Provider Reimbursement
ZGA370-CNTY	Provider Reimbursement Sorted by County
ZGA370-CNTY-YTD	Year-to-Date Provider Reimbursement Sorted by County
ZGA370-A-CNTY	Provider Summary Sorted by County
ZGA370-A-CNTY-YTD	Year-to-Date Provider Summary Sorted by County
ZGA370-5	Legal Summary Report
ZGA370-6	Senior Center Outreach Summary Report
ZGA370-7	Provider Reimbursement Report - IIID/Health Promotion 90%
ZGA370-10	Provider Reimbursement Report - IIID/Health Promotion 85%
ZGA370-11	State Senior Center General Purpose Funding Report
ZGA370-12	Family Caregiver Support Summary Report
ZGA380-A	Regional Summary Report by Category
ZGA380-B	Regional Summary All Categories
ZGA390	Area Agency Summary
ZGA390-Respite	Area Agency Summary - In Home/Family Caregiver/Respite
ZGA390-A	State Summary

Figure 80 – Provider Reimbursement Reports

The name of each report (left column) is a hyperlink which opens the report-builder screen.

> **NOTE**: Each report differs slightly in the parameters a Provider user may select. What follows is a typical example, after which parameter selection will be self evident.

For example, clicking on the first named report (ZGA370 | Provider Reimbursement) opens the parameter selection process:

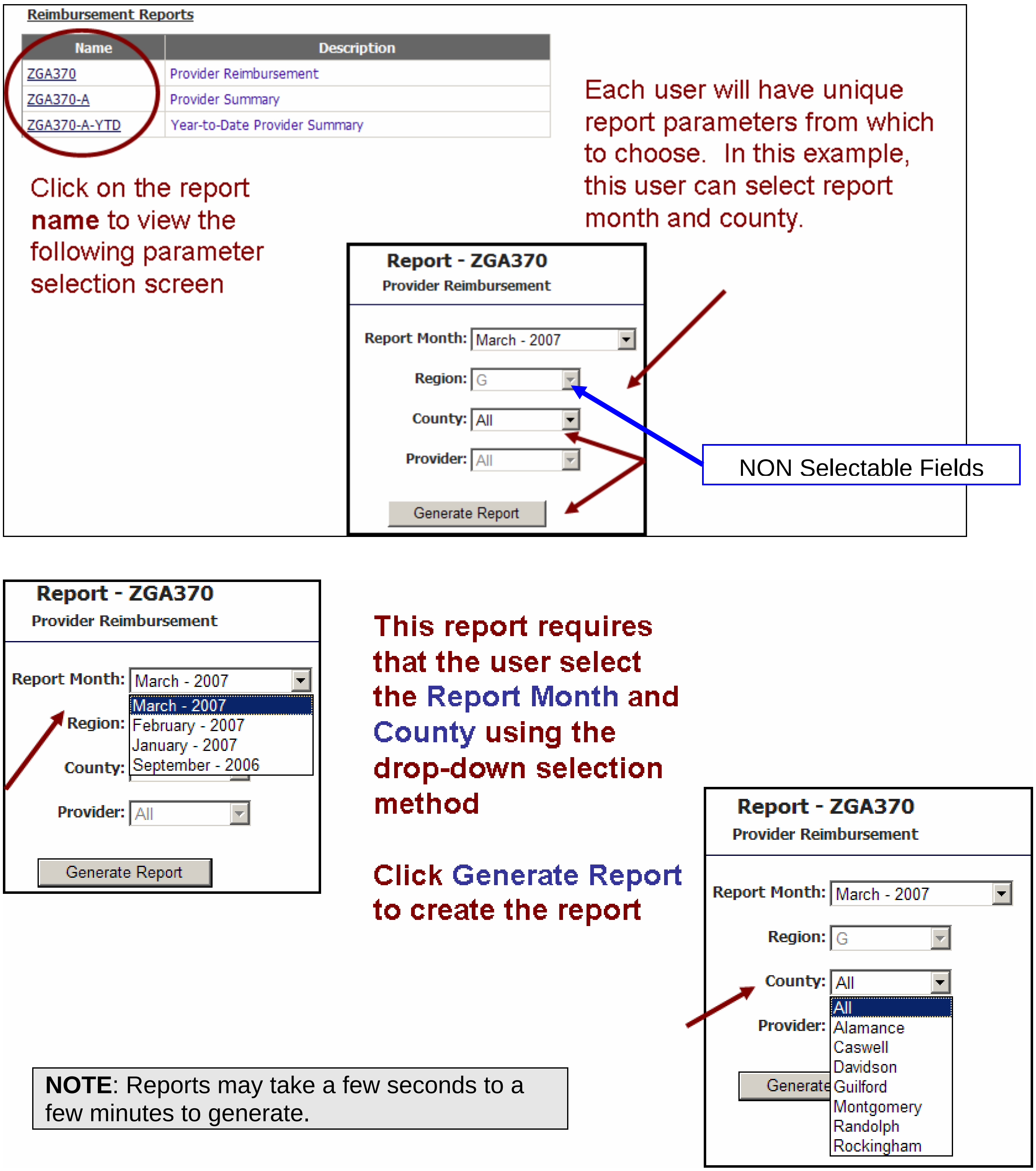


Figure 81 - Typical Report Parameter Selecti

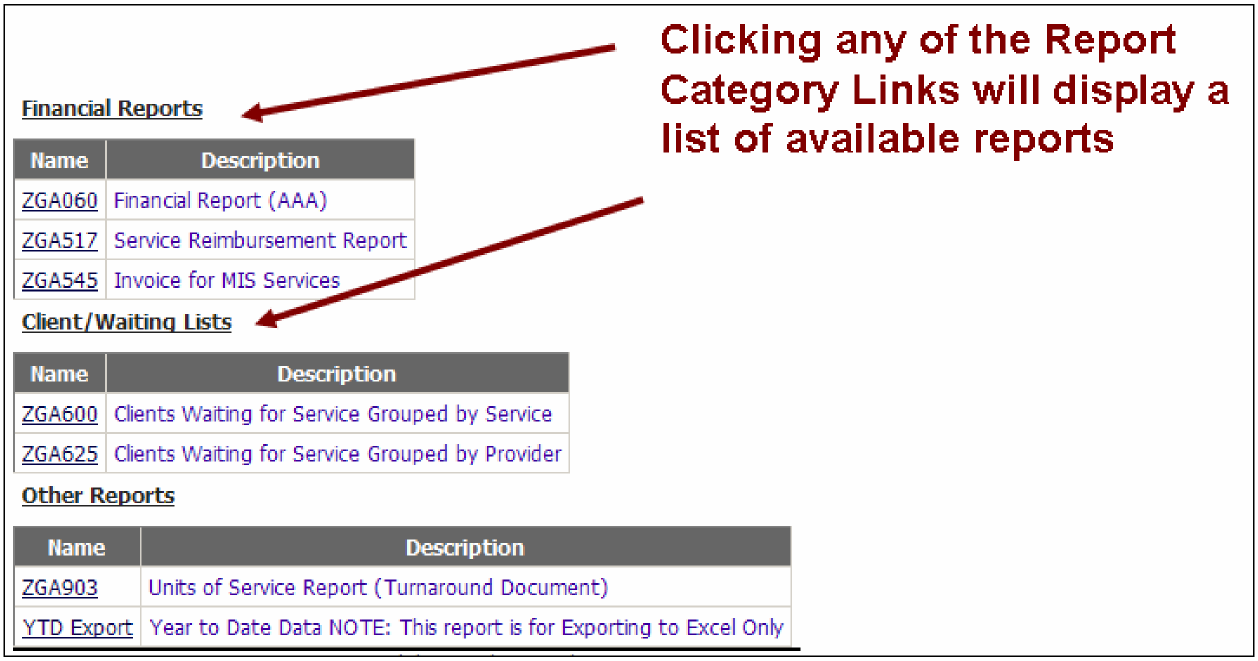


Figure 82 – Report Category Links

Refer to ARMS Reimbursement Manual for information on reports.
Sample ZGA-370 Report

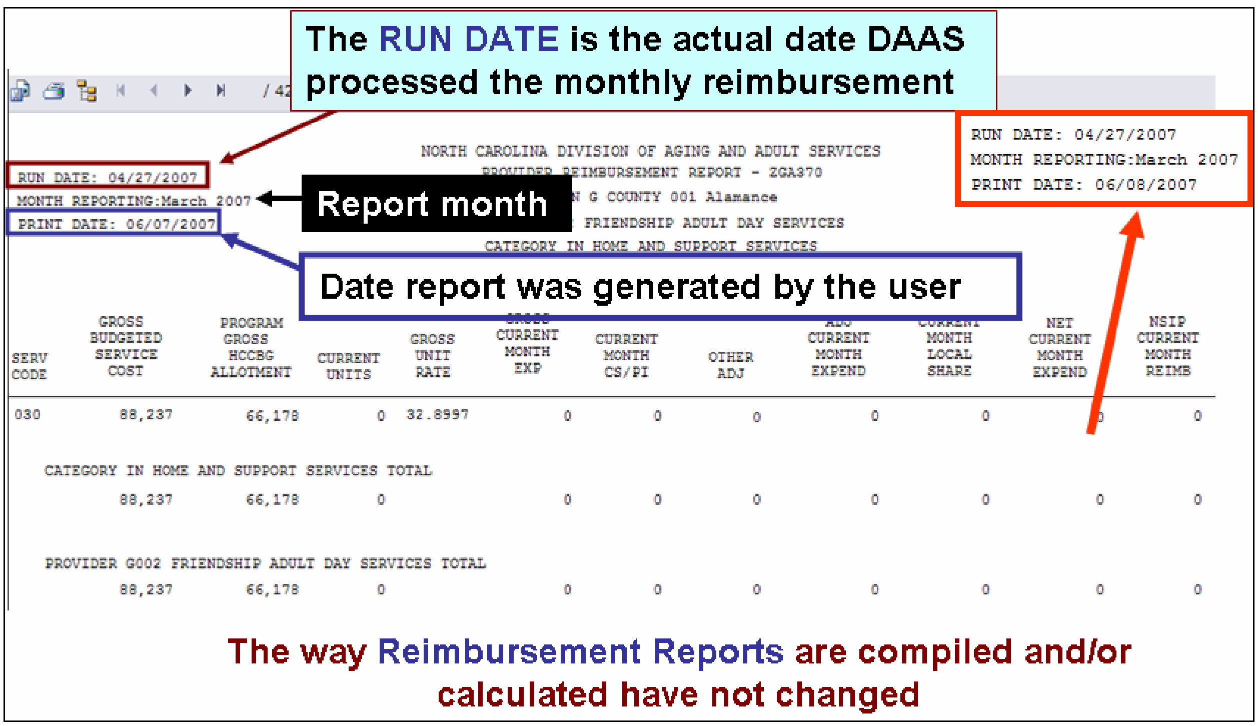


Figure 83 – Sample Report

Demographic Reports

Name	Description
ZGA204-1	Cumulative Unduplicated Persons Served by Region and Provider
ZGA204-2	Cumulative Unduplicated Persons Served by Region and County
ZGA204-3	Cumulative Unduplicated Persons Served by Region
ZGA541-1	Client Demographic Information by State
ZGA541-2	Client Demographic Information by Region
ZGA541-3	Client Demographic Information by County
ZGA541-4	Client Demographic Information by Provider

Click on the link Name of the report

The report functions are the same for all selected report, except Financial Report – ZGA060

As a Region user you can select the year and specify a county if you do not want to print the whole report for the region

Fiscal Year: 2007

Region: G

County: All

Provider: All

Generate Report

Financial Reports

Name	Description
ZGA060	Financial Report (AAA)
ZGA517	Service Reimbursement Report
ZGA545	Invoice for MIS Services

Figure 84 – Report Criteria

Reports are available by User Role. For example, a Region User has access to Financial Reports that a Provider User will not.

4.1.1 Additional Report Functionality

A Report Navigation panel appears in the upper left screen of all generated reports. The following table describes the functionality associated with each icon in this bar.

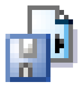
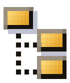
ICON	FUNCTION	DESCRIPTION
	**Export**	Save the report to a different file format (TXT, CSV, etc) for use by an external application.[1]
	**Print**	Prints the report to a user-selectable printer
	**Tree View**	Expands/Collapses reports into logical section (**NOTE:** Not available for all reports)
	**First Page**	Navigates to the first page of the report
	**Previous Page**	Navigates to the previous page of the report
	**Next Page**	Navigates to the next page of the report
	**Last Page**	Navigates to the last page of the report.

Table 3 – Report Navigation Panel Options

[1] TXT = Text File, for import into word processor; CSV = Comma-Separated Values, for importing into spreadsheet or database files; PDF = opens with Adobe Acrobat Reader, if installed on the local PC.

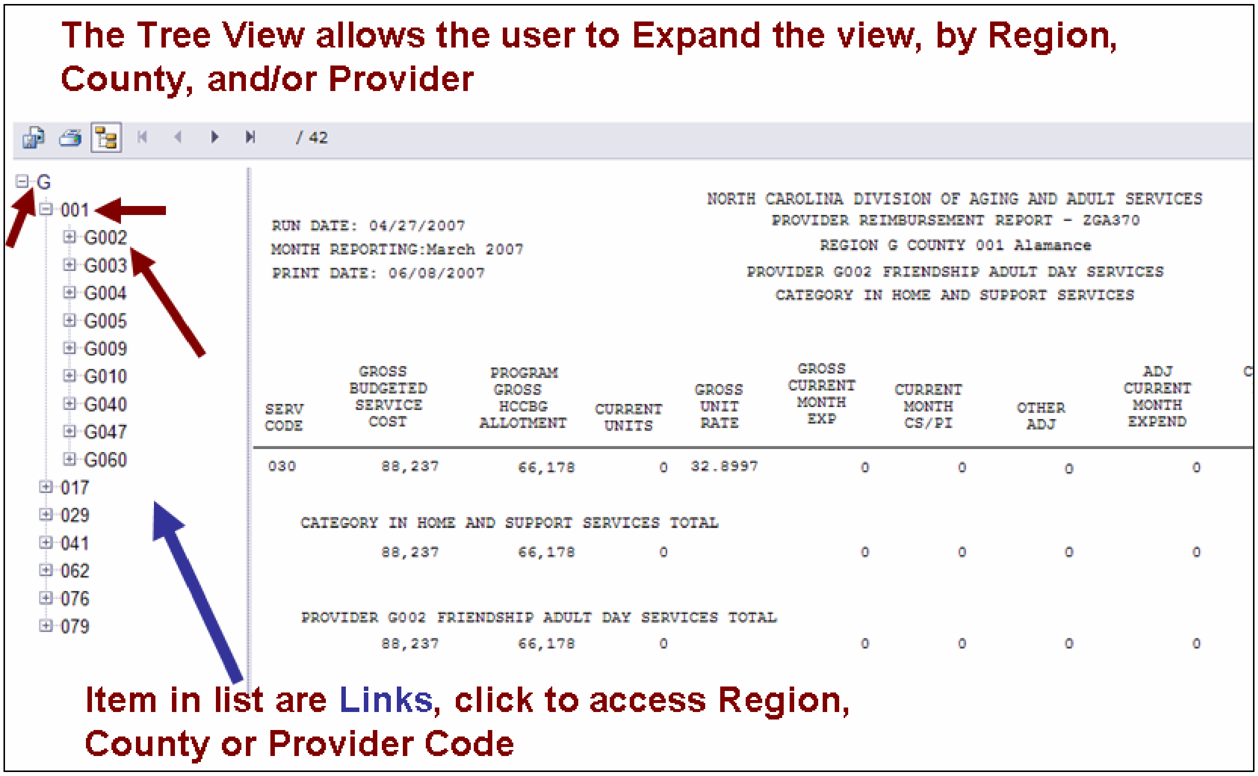


Figure 85 – Report View

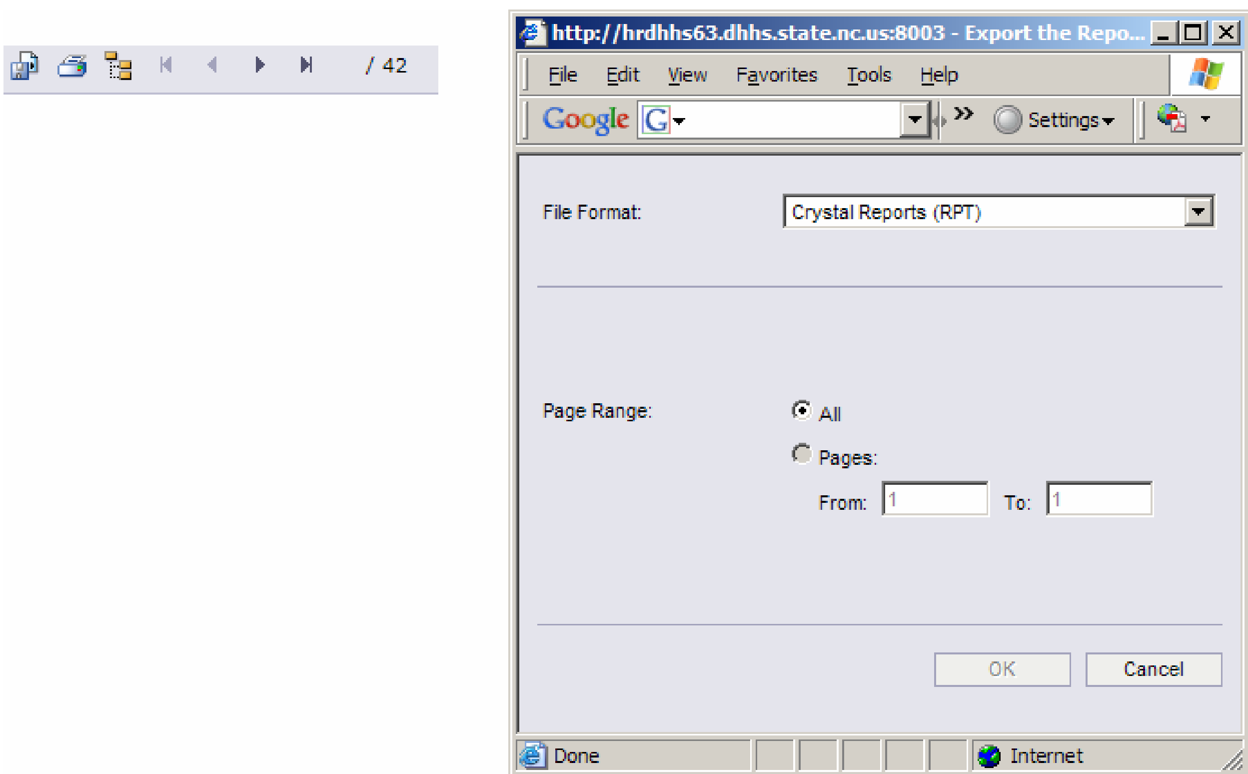


Figure 86 – Report Options to Print

5 Import ARMS

Click the Import Data link on the Navigation Bar drop-down

The following screen appears:

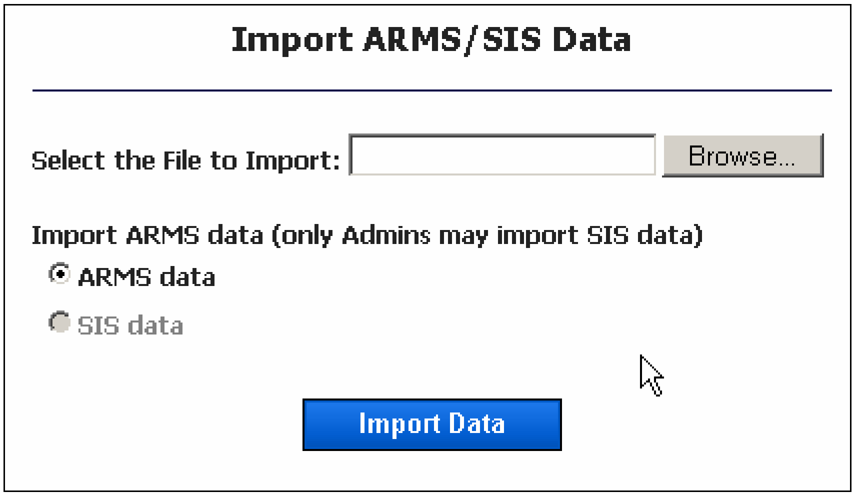


Figure 87 – Import ARMS / SIS Data

Click on **Browse…** to open the Windows File | Open Dialog:

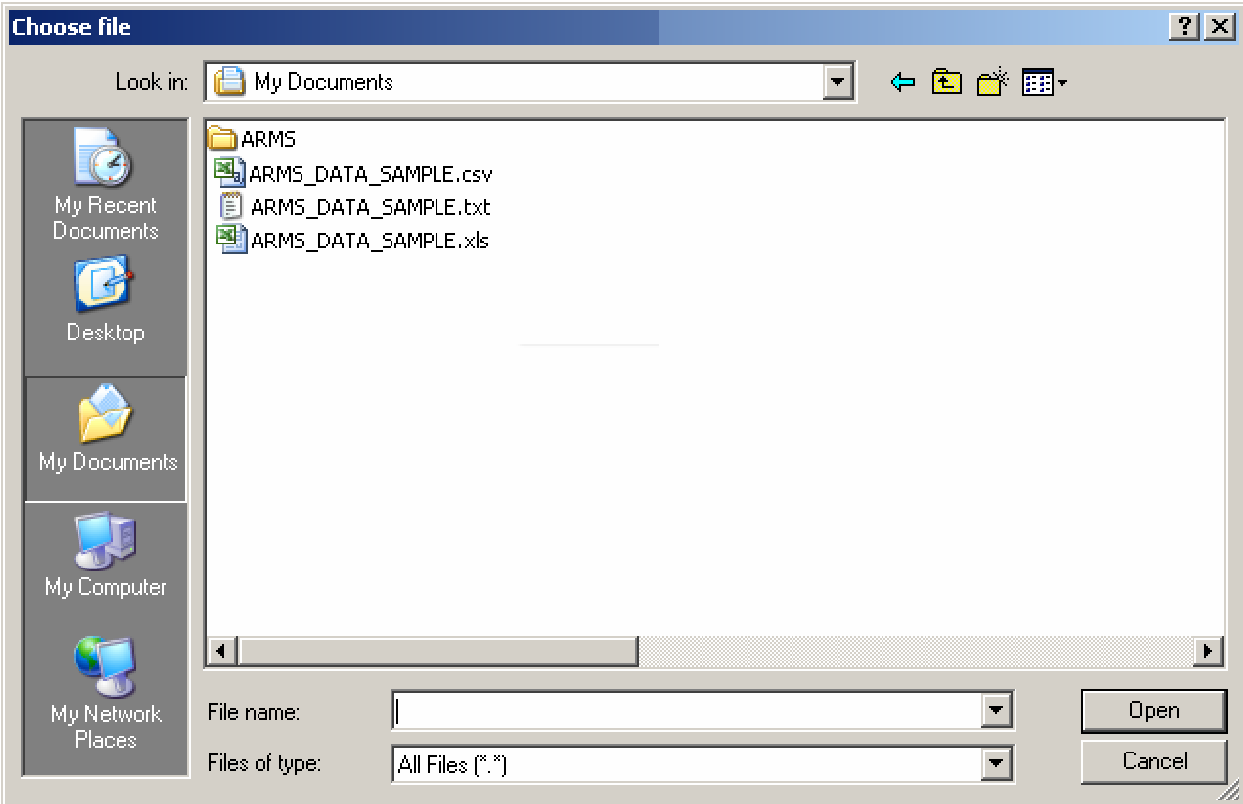


Figure 88 Choose File

Only the following three data file types may be selected for import into ARMS:

1. CSV ("Comma-Separated Values," a common database export/import format)
2. TXT (Text-only files)
3. XLS (Microsoft Excel spreadsheet format)

NOTE: Users must be sure that the file chosen contains the correct data

Select the appropriate file and click **Open.** Then click **Import Data** to transfer the data into ARMS. The user will be prompted the all data was successfully added or an Error Report will display.

The user will be prompted that data was successfully added to ARMS or an Error Report will display.

5.1 Print Error Report

Users should use their Internet Browser print function to print this report. To get the entire report to print, the user should first change the paper orientation to Landscape using the Page Setup feature of their Internet Browser.

Note: Users may want to print the Units of Service Verification Report (ZGA-542) to verify that units were accepted correctly.

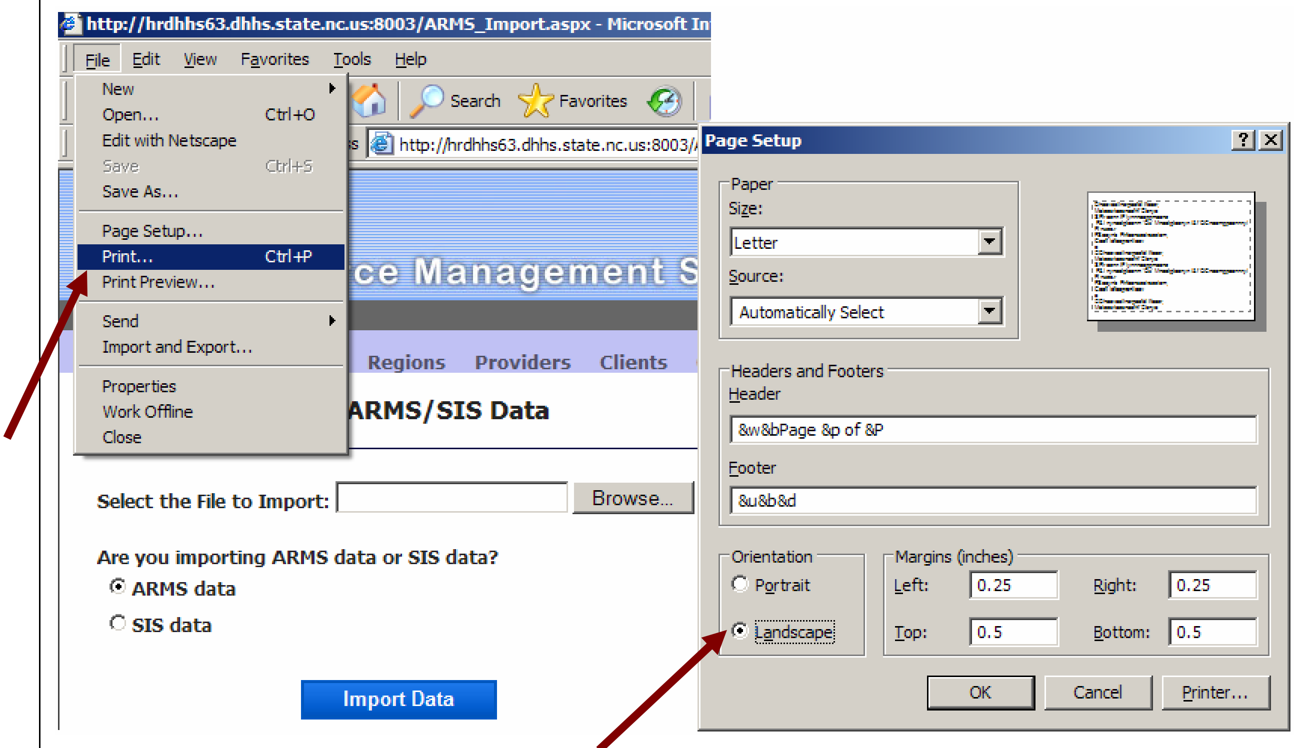


Figure 89 Print Functions